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# INTERNATIONAL DEMOGRAPHICS

CONSUMER ■ TRENDS ■ AND ■ MARKETS ■ ABROAD

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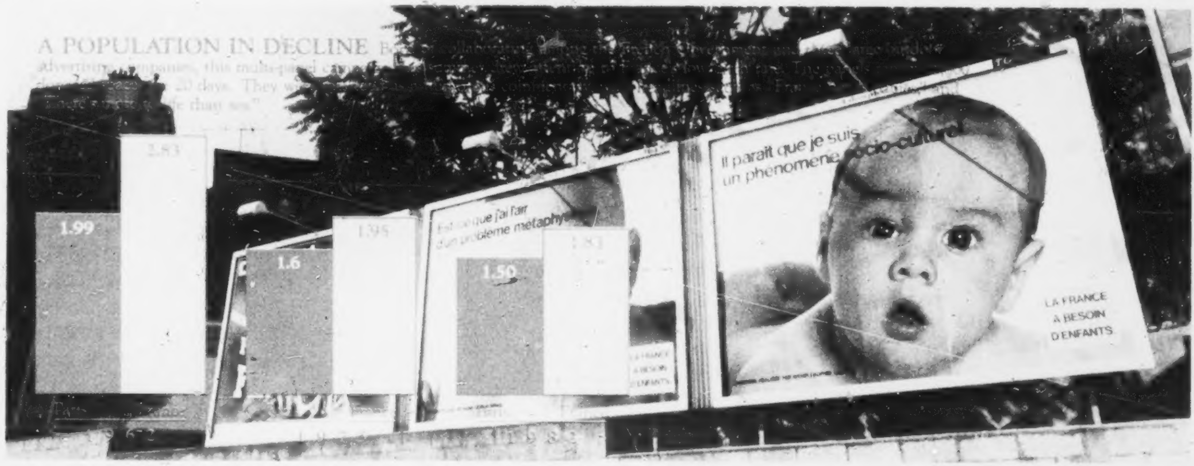

2.83
1.99
1.95
1.6
1.50
1.83
Est-ce que j'ai fait un problème métaphysique
Il paraît que je suis un phénomène socio-culturel
LA FRANCE A BESOIN D'ENFANTS

A POPULATION IN DECLINE

## AREA PROFILE

# ILE DE FRANCE: THE METRO AREA OF PARIS

> *The Tour d'Argent restaurant had a few rooms above the restaurant that they rented in those days, giving the people who lived there a discount in the restaurant, and if the people who lived there left any books behind there was a bookstall not far along the quai where the valet de chambre sold them and you could buy them from the proprietress for a very few francs. She had no confidence in books written in English. . . .*
>
> —Ernest Hemingway, A Moveable Feast

They still overlook the Seine, those small wood-plank bookstalls like the one where Hemingway traded in the early 1920s. And today, across the river at Les Halles, where Baltard's splendid 19th century market pavilions were demolished 15 years ago to make way for a lackluster complex now being completed, can be found a far less picturesque underground book supermarket.

Rented rooms and dining discounts are long gone at the famous 400-year-old three-star restaurant; elsewhere fast food, home-grown and imported, abounds. But English has risen in value in business as well as in literature with the guarded tolerance still accorded most outside influences.

A magazine called *Paris Villages* survives on nostalgia, blithely ignoring the fact that the *quartier populaire* of Hemingway's city has faded. The Tour Montparnasse juts obtrusively over what remains of the author's early Left Bank neighborhood. Other skyscrapers at La Defense on the western outskirts intrude harshly on a once-unbroken view through the Arc de Triomphe at the top of the boulevard Champs-Elysees. The wood-framed bulk wine depot at Bercy adjacent to the Gare du Lyon in the southeast has gone the way of Baltard's cast-iron structures, replaced by a grass-covered pyramid for indoor sports events and concerts.

Another pyramid, this one all glass, planned to sit amidst the ancient architecture of the Louvre as the expanding museum's new entrance, has embroiled its American architect, I. M. Pei, in a raging controversy. And

*continued*

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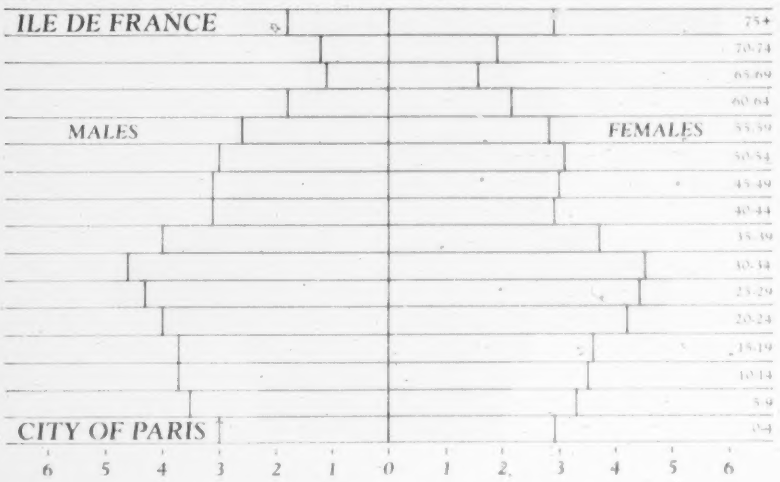
THIS MONTH: PARIS

POPULATION OF ILE DE FRANCE AND THE CITY OF PARIS BY AGE AND SEX: 1982



talks are underway to erect a Disneyland, *a la francaise*, in the area by 1992, when the city hopes to host the summer Olympics.

But apart from its appearance Paris is also that cliche — a state of mind that endures in special ways for most who spend time there. In Hemingway's words, recorded 40 years after his expatriate experience, "there is never any ending to Paris. . . ."

### MORE THAN A CITY MARKET

As the appearance of France's capital changes, so does its social fabric. The shifting demographics of Paris are chronicled in the years following presidential elections which are held every seven years. France alone among industrialized nations holds to this census cycle, thereby complicating comparison with countries that use a five- or ten-year interval.

Detailed data for Paris and other urban centers were released this spring as part of a series of documents focusing on the country's 96 departements which are roughly comparable to counties, and 22 regions incorporating the administrative districts (including the two-departement island of Corsica, a region considered part of mainland France).

Analysis of this small-area data shows that France is now experiencing the same trend seen in the 1970s in Great Britain and the United States — the population in urban areas is migrating to semi-rural areas beyond traditional suburbs but still within commuting distance of city centers and employment. As a result, no population center with a population of more than 20,000 people gained population between 1975 and 1982 — a trend that had remained submerged for more than 100 years.

Seen from a marketing standpoint, the City of Paris functions as the vital hub of a thriving metropolitan area, dominating the country's closely interrelated Ile de France region — an area comprised of 8 departements covering about 7,500 square miles and a population of more than 10 million. Paris is just one of those departements.

Although accounting for only 2.2 percent of the country's land mass, the Ile de France Region houses 18.5 percent of France's total population, making it the most populous among the 22 regions.

Parisians love to leave their city — for long weekends, on a longer winter break, en masse for the traditional August away. On the road they're known by their license plate identification as "the 75-ers." But fewer 75-ers are leaving for good.

For the first time in more than 20 years the rate of population drain from the city center has slowed. Although the city center is still losing population, the census taken by the National Institute for Statistics and Economic Studies (INSEE) found population gains for the Paris metropolitan area and the Ile de France.

Parisians numbered 2.1 million in early 1982 — a figure that could be higher because of apparent discrepancies in the foreign population count, according to the city's own demographic group, the Atelier Parisien d'Urbanisme (APUR). The 1982 population of the Paris metropolitan area — one quarter of which is taken up by the city itself — was 8,706,963, a slight increase over 1975.

The Ile de France region, on the other hand, grew by more than 194,400 residents between 1975 and 1982 to a total of 10 million people. The 1984 estimate of population for the region is 10.1 million, which indicates continued growth during the first half of the decade. About 1.4 million people in the Ile de France live in non-urban areas defined as having fewer than 2,000 residents.

The slowing of the city center's population loss is attributed to several factors. *La crise*, as the French call factors affecting their sluggish economy (expected to grow only 1.1 percent this year but 1.9 percent in 1986), has held down housing starts. Other factors are the aging of the population (making it less mobile), a slight increase in births among inner-city Parisians, and a shortage in older rental housing. APUR claims that the 8.7 percent vacancy rate cited by the census is probably low because some residences declared as "secondary" are, in fact, "primary" housing intentionally being held off the market by wary owners. Under legislation enacted in 1981 by the newly elected Socialist government, tenants are entitled to a minimum six-year lease. Maximum allowable annual rent increases, state man-

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dated and tied to a new construction-cost index, lag behind inflation. The current ceiling of under 5 percent cannot keep up with more than a 6 percent inflation rate.

Not every one agrees that housing is at the root of the turnaround for Paris. While acknowledging these influences, demographer Michel Louis Levy of France's Institut National d'Etudes Demographiques, suggests that Paris' high-speed rail network may be helping to hold down the exodus. The Reseau Express Regional (RER), as distinct from the Metro subway system, transports more than 1 million passengers daily over three lines linking suburbs and city. Levy feels that although the RER functions primarily as a commuter train bringing white-collar homeowners from the suburbs to the city center and back again at the end of the working day, its easy availability is helping to revitalize the city center due to what might be called a "reverse RER effect."

Census after census also has shown a decline in the diversity of Parisian life. It's a development that Levy regrets: "Paris is becoming more and more bourgeois. The quarter with its cross-section of population that your American writer Henry Miller knew after the first war, with little exception, is lost to the present generation."

A glance at the data for skilled and unskilled workers living in Paris backs up this assertion: over the past 20 years the city has lost half its blue-collar jobs. Today the service sector is said to account for about three-quarters of all employment in Paris. Durable-goods marketers sensing increased prospects as a result of the spreading *embourgeoisement*, however, should tread cautiously. As recently as August, France's finance minister warned that purchasing power, which the government claims expanded by more than 4 percent on average from 1981 to 1985, but which demographic sources say is declining, is unlikely to show any upward tendency soon.

### ADMINISTRATIVE AREAS

Jacques Chirac, the mayor of Paris, is not the only mayor in town. Each of 20 *arrondissements*, or wards, has an elected mayor and a local city hall called a *marie*. Each arrondissement is further subdivided into *quartiers* (which total 80) and *ilots*, or districts and neighborhoods. The Seine on its crescent-shaped course through Paris roughly divides the city into its Right Bank and Left Bank. Much of the central area is built on reclaimed marshland — from which the Marais quartier takes its name.

Each arrondissement uses funds raised largely through a series of direct and indirect taxes to provide essential maintenance services, health care and hospitalization, preschool and continuing education, and sports and recreation. As the latitude for action at this level of government is broader than in some other cities, cultivating local contracts when doing business can help newcomers establish a foothold in Paris at large.

What is often said about the country's national structure — that it is *coupe en deux*, divided between hard right and left views — also applies in another way to the demographics of the capital city. If one were to draw a perpendicular line through the center of Paris, the poorer areas in terms of income, housing, and other economic indicators would be found to the right (and on the left politically), in a crescent extending from the eastern part of the 18th arrondissement through the 13th and part of the 14th arrondissements. To the right in arrondissements such as the 8th and the

## POPULATION OF ILE DE FRANCE BY AGE AND SEX: 1982

| *age* | *total* | *male* | *female* |
|---|---|---|---|
| All ages | 10,071,068 | 4,885,588 | 5,185,480 |
| 0-4 | 591,344 | 302,160 | 289,184 |
| 5-9 | 681,204 | 348,808 | 332,396 |
| 10-14 | 728,840 | 374,136 | 354,704 |
| 1549 | 729,592 | 371,076 | 358,516 |
| 20-24 | 829,852 | 402,436 | 427,416 |
| 25-29 | 876,256 | 432,012 | 444,244 |
| 30-34 | 914,616 | 459,032 | 455,584 |
| 35-39 | 778,008 | 400,472 | 377,536 |
| 40-44 | 608,296 | 315,088 | 293,208 |
| 45-49 | 614,076 | 312,136 | 301,940 |
| 50-54 | 615,904 | 306,652 | 309,252 |
| 55-59 | 543,260 | 262,132 | 281,128 |
| 60-64 | 403,700 | 183,228 | 220,472 |
| 65-69 | 271,624 | 114,640 | 156,984 |
| 70-74 | 315,368 | 122,208 | 193,160 |
| 75+ | 569,128 | 179,372 | 389,756 |

## POPULATION OF THE CITY OF PARIS BY AGE AND SEX: 1982

| *ages* | *total* | *male* | *female* |
|---|---|---|---|
| All ages | 2,176,652 | 1,008,176 | 1,168,476 |
| 0-4 | 95,956 | 49,132 | 46,824 |
| 5-9 | 98,272 | 50,260 | [illegible]8,012 |
| 10-14 | 98,416 | 50,592 | 47,824 |
| 15-19 | 111,004 | 55,168 | 55,836 |
| 20-24 | 195,164 | 88,880 | 106,284 |
| 25-29 | 215,924 | 106,856 | 109,068 |
| 30-34 | 205,404 | 104,052 | 101,352 |
| 35-39 | 165,072 | 84,308 | 80,764 |
| 40-44 | 125,008 | 64,856 | 60,152 |
| 45-49 | 122,596 | 60,880 | 61,716 |
| 50-54 | 131,232 | 61,836 | 69,396 |
| 55-59 | 130,596 | 58,084 | 72,512 |
| 60-64 | 110,876 | 46,344 | 64,532 |
| 65-69 | 83,836 | 32,668 | 51,168 |
| 70-74 | 102,524 | 37,516 | 65,008 |
| 75+ | 184,772 | 56,744 | 128,028 |

16th, a considerably higher standard of living prevails.

The most-populated arrondissement historically is the 15th in the southwest with a population of 225,600 in 1982. The fewest residents live in the 1st of the city's core — only about 18,500.

All arrondissements lost population in the last census except the 13th, which in recent years has seen the influx of large numbers of students and Southeast Asian refugees. Six Right Bank arrondissements are more than a third populated by foreigners. The residential drain in the historic center was greatest in the 2nd and 1st arrondissements. The 2nd lost 19.5 percent of its population and the 1st declined by 18.8 percent.

### AGE STRUCTURE

The age and sex distribution of Ile de France reflects the effects of the World Wars and the postwar baby booms. The percentage of the city's population aged 75 and older is growing, but so are the 30-to-39-year-olds — those who were born during France's approximately 10-year postwar baby boom.

In 1982, children aged 14 and under made up nearly 20 percent of the total population, and people aged 60 and older about 15 percent of the population — proportions similar to those of other developed countries. Nearly 34 percent of the population in Ile de France was between the ages of 20 and 39, reflecting, in part, the higher birthrates after World War II and the fact that this group has not been decimated by a world war since.

The 0-4 age group matched the figure of 20 years ago at 4.7 percent, reversing a drop of .1 percent in each of the two preceding censuses.

### HOUSEHOLDS AND HOUSING

The number of households in Paris registered 1.28 million in 1982, an increase of 41,000 over 1975. This 3.2 percent gain compares with an increase of only 1.4 percent between 1968 and 1975 and reflects a decline in household size over the past 20 years. The average number of persons per household dropped to 1.9 in 1982 compared with 2.0 in 1975, 2.1 in 1968, and 2.2 in 1962. Paris has the smallest household size of any large French city. The trend is true for all of Paris' 20 arrondissements but, as might be expected, has not been as severe in the 13th and 19th where household size surpasses two persons.

## THE REGION, THE CITY, AND THE DEPARTMENTS OF THE URBAN AREA

| | *Ile de France* | *Ville de Paris* | *Seine et Marne* | *Yvelines* | *Essonne* | *Hauts de Seine* | *Seine St. Denis* | *Val de Marne* | *Val d'Oise* |
|---|---|---|---|---|---|---|---|---|---|
| **Total population** | 10,071,068 | 2,176,652 | 885,764 | 1,196,828 | 987,988 | 1,386,244 | 1,326,548 | 1,192,692 | 918,352 |
| Under age 14 | 20% | 13% | 24% | 23% | 23% | 18% | 22% | 20% | 23% |
| Over age 64 | 11% | 18% | 11% | 8% | 9% | 12% | 9% | 11% | 9% |
| Foreigners | 13% | 17% | 9% | 11% | 9% | 14% | 17% | 13% | 11% |
| Economically active | 49% | 51% | 46% | 47% | 48% | 50% | 49% | 50% | 48% |
| Female | 44% | 47% | 42% | 41% | 43% | 44% | 43% | 45% | 43% |
| **Total households** | 3,937,012 | 1,097,452 | 300,436 | 404,756 | 329,476 | 570,604 | 478,564 | 446,716 | 309,008 |
| Average size | 2.6 | 2.0 | 2.9 | 3.0 | 3.0 | 2.4 | 2.8 | 2.7 | 3.0 |
| 1 person households | 30% | 48% | 19% | 19% | 17% | 32% | 24% | 25% | 18% |
| 2 person households | 28% | 28% | 27% | 26% | 26% | 30% | 28% | 29% | 27% |
| 3 person households | 19% | 12% | 21% | 22% | 23% | 18% | 21% | 21% | 23% |
| 4 person households | 15% | 18% | 20% | 21% | 22% | 13% | 16% | 16% | 20% |
| 5+ person households | 7% | 4% | 13% | 13% | 12% | 7% | 11% | 9% | 12% |
| **Total families** | 2,611,564 | 510,484 | 237,984 | 317,748 | 265,120 | 363,920 | 349,592 | 321,000 | 245,616 |
| With no children | 50% | 60% | 45% | 44% | 45% | 54% | 48% | 51% | 43% |
| With 1 child | 25% | 22% | 25% | 25% | 26% | 24% | 26% | 25% | 26% |
| With 2 children | 18% | 13% | 21% | 21% | 21% | 16% | 18% | 17% | 20% |
| With 3+ children | 7% | 5% | 9% | 9% | 8% | 6% | 9% | 7% | 9% |
| **Total housing units** | 3,937,012 | 1,097,452 | 300,436 | 404,756 | 329,476 | 570,604 | 478,564 | 446,716 | 309,008 |
| With central heating | 80% | 64% | 91% | 89% | 90% | 84% | 83% | 85% | 88% |
| With inside bath/shower | 87% | 78% | 91% | 94% | 94% | 87% | 88% | 90% | 93% |
| With inside toilet | 87% | 79% | 91% | 93% | 93% | 89% | 88% | 90% | 92% |
| With all amenities | 72% | 54% | 77% | 84% | 85% | 75% | 75% | 78% | 83% |
| With telephone | 84% | 81% | 84% | 86% | 88% | 84% | 81% | 85% | 86% |
| **Total labor force** | 4,933,176 | 1,105,744 | 410,928 | 562,768 | 473,808 | 700,036 | 647,968 | 591,628 | 440,296 |
| Top-level managers | 6% | 7% | 6% | 5% | 5% | 5% | 5% | 6% | 5% |
| Professionals/administrators | 13% | 19% | 9% | 16% | 12% | 15% | 6% | 11% | 9% |
| Middle-level managers | 18% | 18% | 16% | 19% | 20% | 19% | 15% | 18% | 18% |
| White-collar workers | 26% | 24% | 26% | 26% | 27% | 26% | 29% | 28% | 27% |
| Blue-collar workers | 27% | 20% | 32% | 25% | 27% | 25% | 36% | 28% | 31% |
| Service workers | 8% | 10% | 6% | 6% | 7% | 7% | 7% | 8% | 6% |
| Farmers/farm laborers | 1% | <1% | 3% | 1% | 1% | 1% | 1% | 1% | 1% |
| Other categories | 2% | 3% | 2% | 2% | 2% | 2% | 2% | 2% | 2% |

Source: *Recensement general de la population de 1982, vol. II, Ile-de France, Institut National de la Statistique et des Etudes Economiques*

# AT A GLANCE: PARIS

### The Oldest

XVI
VI
VII
Val-de-Marne
Hauts-de-Seine
Seine-et-Marne

### Youngest

X
XIII
IXX
Yvelines
Essonne
Val-d'Oise

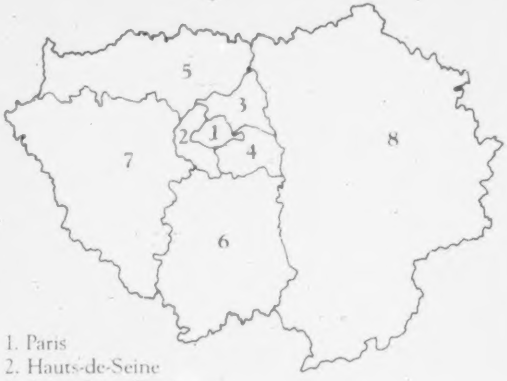
### Largest Share of Professionals

V
VI
VII
XVI
Yvelines
Haute-de-Seine
Seine-Saint-Denis
Val-de-Marne

### More Than Half One Person Households

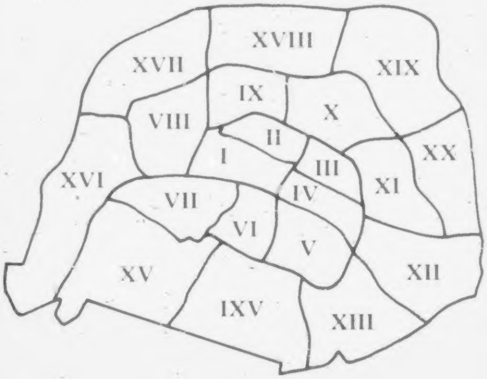
I-VI
VII
IX
XVII

### DEPARTEMENTS OF THE ILE DE FRANCE



1. Paris
2. Hauts-de-Seine
3. Seine-Saint-Denis
4. Val-de-Marne
5. Val-d'Oise
6. Essonne
7. Yvelines
8. Seind-et-Marne

### ARRONDISSEMENTS OF THE CITY OF PARIS



### Highest Share of Foreigners

X
II
III
Seine-Saint-Denis

### Working Class

Seine-Saint-Denis
Seine-et-Marne

### Most Housing With All Amenities

XV
XII
IXV
Val d'Oise
Essone
Yvelines

### Most Families

Val d'Oise
Yvelines

## ARRONDISSEMENTS OF PARIS

| | *population* | *percent change 1975-82* | *percent under age 14* | *percent aged 65 and over* | *percent foreigners* | *percent people living alone* | *percent households with all amenities* |
|---|---|---|---|---|---|---|---|
| I. | 19,000 | -18.8 | 11 | 19 | 19 | 53 | 37 |
| II. | 21,368 | -19.5 | 13 | 17 | 24 | 57 | 25 |
| III. | 35,632 | -13.5 | 12 | 17 | 22 | 54 | 33 |
| IV. | 33,880 | -16.0 | 11 | 18 | 13 | 54 | 41 |
| V. | 62,128 | -8.1 | 12 | 17 | 14 | 55 | 50 |
| VI. | 49,184 | -13.2 | 12 | 19 | 13 | 53 | 51 |
| VII. | 67,024 | -9.1 | 13 | 18 | 14 | 51 | 58 |
| VIII. | 45,800 | -12.4 | 14 | 18 | 20 | 48 | 58 |
| IX. | 64,560 | -8.7 | 13 | 20 | 17 | 52 | 41 |
| X. | 86,940 | -7.5 | 14 | 16 | 22 | 49 | 37 |
| XI. | 145,776 | -7.8 | 14 | 17 | 21 | 49 | 40 |
| XII. | 139,144 | -2.0 | 13 | 18 | 12 | 48 | 57 |
| XIII. | 170,320 | +4.6 | 16 | 14 | 15 | 44 | 65 |
| XIV. | 139,788 | -7.1 | 14 | 18 | 15 | 49 | 56 |
| XV. | 225,628 | -2.5 | 14 | 16 | 12 | 50 | 66 |
| XVI. | 178,696 | -7.3 | 13 | 19 | 17 | 47 | 73 |
| XVII. | 168,600 | -9.0 | 13 | 19 | 15 | 50 | 53 |
| XVIII. | 187,760 | -10.6 | 13 | 18 | 20 | 49 | 39 |
| XIX. | 163,356 | +12.7 | 19 | 12 | 20 | 40 | 62 |
| XX. | 171,885 | -2.2 | 17 | 14 | 19 | 44 | 56 |

*Sources: Institut National de la Statistique et des Etudes Economiques, Premiere Resultats, March 1985.*

One person households predominate in the Paris metro area. In 1982 48 percent of all housing was occupied by one-person households, of which 64 percent were made up of women, most of them elderly. Furnished rooms and *chambres de bonne* — quarters just under the eaves formerly occupied by maids — are 80 percent occupied by people living on their own.

Two-person households on the other hand declined from nearly 30 percent in 1975 to only 28 percent seven years later, thus continuing a 30-year trend. Twelve percent of households had three persons. The remaining 12 percent had more than three persons.

The more spacious lodgings, those with five or more rooms, are located in the so-called *beaux quartiers* in the western part of the city where the number of under-used apartments is on the increase. Thirty-five percent of Parisian housing lives up to the ideal standard of one person or couple per room, plus a communal room. Overcrowding is severe in only 10 percent of housing.

For many years the lack of interior sanitary facilities in much of Paris' housing stock was legendary. Newcomers today find a changed situation. Renovation of about 10,000 dwellings per year and new housing projects have helped to raise the share of principal residences with complete toilet and bathing facilities to 79 percent. But, when all amenities, including central heating, are taken together, 54 percent of Parisian housing meets the "fully-equipped" criteria, compared with 63 percent for all of France.

The age of many Paris buildings tends to make modern improvements difficult. In the historic center, for example, more than 70 percent of structures were built before 1871. An estimated 75 percent of all Paris housing is pre-World War I and 34 percent of that is said to have been built prior to 1871.

The cost per square meter for housing in Paris varies widely, generally moving from higher to lower in an easterly direction. As an indication, a three-room apartment of 65 square meters with a monthly rent equivalent to about $295 in the 18th arrondissement could rent for five or more times that amount in one of the Left Bank neighborhoods. Some of the most expensive real estate is on the islands in the Seine where Paris first took root.

The City of Paris had 510,584 families in 1982 of which 392,580 were native French. Of those with children, nearly 113,000 had one child aged 16 or under, more than 65,000 had two children aged 16 or under, and 24,000 had three or more children, aged 16 or younger. The metro area had a total of 2.25 million families, 1.9 million of them French. Taken in total, the region has about 2.6 million families.

In 1982, about 42 percent of Paris residents were married couples, 8 percent were widows or widowers, nearly 6 percent were divorced, and nearly 44 percent were single. France has long recognized *concubinage* as a legal status, with unmarried couples entitled to social benefits some countries reserve only for conventionally married couples and their families. Thus, the percentage of singles includes a high proportion of people who live together in couples.

### LABOR FORCE AND INCOME

At least a half million Paris residents hold management or professional jobs. Of an active labor force consisting of about 1.1 million in 1982, men represented 49 percent. Men also accounted for somewhat more than half of the city's 89,000 unemployed in 1982.

The agglomeration's management professional grouping was more than 1.5 million, with another 200,000 distributed throughout the region. The labor force divides equally among men and women in the Ile de France region.

By the government's own admission in early September, unemployment remains France's dominant political and social problem. At 9.7 percent last year and 10.5 percent this year, it is expected to rise to 11 percent of the active work force in 1986. Youth unemployment is even more severe.

With about one-quarter of the population of the metropolitan area, Paris also produces half the area's jobs. Average wages in the Paris metro area are at least 22 percent higher than for the country as a whole.

Efforts to decentralize jobs to the near and far suburbs have been only partially successful. About 3 million workers commute an average of 40 to 60 minutes daily to and from the suburbs — many to city jobs in banking, insurance, and other service industries. Although the number of services has decreased, the service sector, exclusive of retail trades, still accounts for about half the metro area's employment in this category, or 217,000 jobs in 1982. Retail services, including hotel, restaurant, and cafe work, provide another 285,000 jobs. Paris' industrial sector supplies more than 30 percent of the metro area total. Among the largest employers are fashion and clothing (23,000 jobs), hotels, restaurants and cafes (57,000), and social and human services (61,000). Mayor Chirac's office itself provided employment for 36,300 people in 1982.

Income data are difficult to obtain since 1976 because of new privacy protection measures. However, certain generalizations can be made for the region.

A "scale of wealth" developed by one research group using per capita annual consumption as an indicator, places the Ile de France region first in the country, ahead of Provence-Cote d'Azur, the Mediterranean retirement choice for those who can afford it. The 8th and 2nd arrondissements in Paris are the wealthiest.

An INSEE salary analysis released in June shows a geometric progression of income beginning in about 1968. The average monthly salary for the entire work force in the private and semipublic sectors rose last year to 6,850 ff, up 450 ff from 1983. Annual salaries for upper management in 1984 averaged 206,490 ff; those of middle management 104,182 ff; supervising industrial workers, 97,573 ff; office employees, 66,862 ff; and blue-collar workers, 50,242 ff to 67,977 ff, according to level of qualification. Stated another way, half of French workers earn more than $660 per month. The monthly minimum wage, which under the Socialist government has risen considerably, is now about $515.

Despite these increases, average buying power declined 0.3 percent in real terms from 1983 to 1984 even though inflation had slowed to a 14-year low.

Average salaries in Paris and to a lesser extent in the rest of the metro area, however, run more than one-fifth higher than the national average. Also, a fairly generalized practice throughout France is "the 13th month," or an extra month's salary generally given to workers toward the end of the year yet ostensibly used to pay for a now mandatory five weeks vacation.

Income taxes are modest for Parisians as for their countrymen, but the French are still among the most heavily taxed people anywhere because of a series of other direct and indirect levies, including a value-added tax on purchases of many goods and services. Taxes amount to more than 45 percent of gross industrial output, compared with 37 percent in West Germany and 39 percent in the United Kingdom. Social security taxes alone represent 18.8 percent of output — more than 10 percent above that of the United States and higher than most other Western European countries.

Paris had 1.4 million active savings accounts in 1982, an increase of about 40,000 over the previous year. High taxes, slipping purchasing power, and a decline in government dictated savings account interest rates earlier this year may be one reason savers in Paris and elsewhere in France withdrew 7 billion ff in the second quarter of this year.

### CONSUMPTION

Meaningful current figures for household consumption within Paris are not available. However, figures developed at the national and metro level by INSEE, INED, and others provide some indication of the city's spending and consumption patterns. For other reflections on local and national consumption, see the sidebar in this issue.

According to one study, the highest per capita consumption in France occurs in Paris' 8th arrondissement: 204,000 ff or about $24,000 spent yearly. In fact, seven arrondissements of the city rank in the country's top 10 consumption centers, which also includes St. Tropez. The same study shows the Paris Region with an annual per capita consumption of about 57,000 ff (about $6,700). A tax on substantial incomes introduced by the Socialists affects more people in the Ile de France than in any other region, according to the study. In that region, it affects 42,045 persons, or more than 62 percent of those so taxed in France. The runner up is the Provence-Cote d'Azur at 10,543 (7.2 percent of so-called grandes fortunes). INSEE projects a slowdown in household consumption through 1990 with a projected 1.9 percent dip in spending during the decade of the 1980s.

Although the present government has given greater administrative authority to the regions, Paris will always be the center for commerce, communications, education, medicine, and opinion-making.

## INSIDE INFORMATION

### A PARIS POTPOURRI

The annual Paris Marathon has taken on world-class status and *le jogging* or *le footing* — sweatshirts sport both — is a daily event around the city's 50 parks and nearby woods.

One in five Frenchmen jogs. Those running or doing aerobic exercise have doubled in a decade, including twice the number of women as in 1973. Paris alone has 21 sports clubs. More than 11 million people belong to sports organizations throughout the country. And Parisians are the country's biggest shoe buyers. With their countrymen, they bought 20 million pairs of running shoes in 1984.

Fitness is definitely on the rise in the French consciousness. Last year alone each adult spent about 6,000 ff (more than $700) on health-related needs, compared with 870 francs in 1970. The portion of household budgets devoted to health is nearly 15 percent today, compared with only about 9 percent 15 years ago. Advertising for bottled water — at least ten brands exist in France — reflects the health kick: *C'est bon l'equilibre* — is one campaign theme.

Nationally, spirits consumption is up, but, *zut alors!*, wine consumption is down. Two million French stopped drinking the stuff entirely in the last five years. In 1980, three-quarters of the French population aged 15 and over drank some wine regularly. Today, it's only 69 percent. Still, fully 42 percent of digestive tract illness is attributed to cirrhosis of the liver.

Smoking among men has declined 9.5 percent over the past five years, but increased 5 percent among women — trends evident in other developed countries as well. The state controls tobacco manufacture and runs an anti-smoking campaign.

## ANOTHER REVOLUTION: HOW THE FRENCH VIEW ADVERTISING

Surveys going back ten years show that the French in substantial numbers have a phobia about *publicite*, a loathing and distrust of advertising.

Today that has changed. Forty-two percent believe that advertising informs, 18 percent that it distracts, rather than manipulates (36 percent). That advertising approaches art is a view held now by 60 percent of the French.

This revolutionary turnaround in how people feel about advertising was revealed in a poll conducted jointly by the research group IPSOS and the news weekly, *Le Point*. Findings were published in August.

Advertising in France generates nearly 50,000 jobs and more than $4 billion in annual revenues. West Germany spends 50 percent more, the United Kingdom twice that, and the United States, 2.5 times more.

The IPSOS-*Le Point* research further found that 72 percent of the representative 1,000 respondents had a "good" opinion of advertising professionals. This approval rating — another reversal from the attitudes expressed in earlier polls — jumped 10 percent higher among 15-to-25-year-olds.

When asked whether an advertising message or political talk was of more interest, 55 percent voted for advertising — 72 percent if they were under age 35.

One in three respondents said they make purchase decisions on the basis of advertising, and 41 percent believe advertising revenues give the media the ability to function independently. Forty-six percent think advertising can affect social mores — borne out by the fact that a recent campaign on prudent use of alcohol prompted wine and beer makers to mount campaigns to bolster slipping consumption.

Television best reflects society for 70 percent of respondents, advertising for 32 percent. At least half hold the opinion that television should permit commercials for currently banned products — books, publications, entertainment events, tourism, supermarket chains, part-time employment agencies, and housing.

Traces of the distrust, however, remain. Only 8 percent of those surveyed knew the true cost of advertising calculated in the price of an economy-sized box of laundry detergent. In a somewhat lighter, hypothetical vein, 53 percent were against having a giant Coca-Cola bottle posed at the Arc de Triomphe during the duration of renovations the soft-drink company agreed to underwrite. And, to the question of whether the French president should go on screen abroad to promote tourism at home the way Lee Iacocca has done, the majority said *non*.

A decade ago it would have been foolish to think that music from commercials could go commercial. Now the South American rhythm accompanying a Nescafe spot sells 1.5 million records. Another for Hollywood chewing gum rings a half-million sales while the jingle promoting subway and bus use nets 100,000. An all-night screening of nothing but television commercials played to a sold-out general audience earlier this year at a large, posh movie theater in Paris.

Jacques Seguela, a high-profile advertising executive who successfully promoted the election of the current president of France and who helped compile the survey's questions, wrote a book a decade ago called *Don't Tell My Mother I'm in Advertising, She Thinks I'm a Piano Player in a Bordello.* His latest and less-defensive offering, to use a literal translation of its title, is *Son of Advertising.*

More than half a dozen national dailies and 83 percent of weekly publications are headquartered in Paris. So are 64 percent of French companies. Four national television networks — one subscriber-supported — are Paris-based and two new private channels due next year are expected to locate there as well. Several of the hundreds of FM stations approved by the government since 1981 broadcast to the city and metro area. And cable installation now underway should encourage local TV programming.

One-third of France's students are enrolled in universities located in Paris — 194,500 in its 10 universities in 1982. The city has 7,000 doctors, 2,800 dentists, and 115 hospitals with 22,400 beds. The nearly 15 percent of the French household budget spent on health-related services goes in part to the 1,130 pharmacies in Paris. And the city is still mecca for artists; 60 percent of those in France live in the City of Lights.

### SOURCES

Editor's Note: Another digit is being added to telephone numbers throughout France on October 25. All numbers given here should be verified since this issue went to press before that date.

*Recensement general de la population de 1982, Resultats du sondage au ¼: Population, Emploi, Menages, Familles, Logements.* Volume 11, Ile de France. Price 80 ff (about $9.50). This 60-page volume explains in French how the census was conducted, changes in terms since 1975, and provides data for the City of Paris, suburban areas, and the region as a whole (Ile de France). More than 150 documents published to date related to the 1982 census by the Institut National de la Statistique et des Etudes Economiques (National Institute of Statistics and Economic Studies) also are listed by price.

Write INSEE, Tour Gamma A, 195, rue de Bercy, 75582 Paris Cedex 12. Phone (1) 345.72.31. Telex: 230541-F INSEEOEP. Ask for free 150-page printed catalog of available documentation arranged by subject.

INSEE also publishes *Ville de Paris*, a 540-page volume tracing the last four censuses (150 ff, or about $17.50) and a four-page background report on Paris population characteristics, *Premiers Resultats No. 33 (March 1985), Les Habitants de Paris en 1982* (8 ff, about 95 cents). Both are in French.

*Atlas des Parisiens* is an exceptionally well-done appraisal of 80 demographic aspects of life in the city. Short texts with English summaries are accompanied by color graphics. A drawback is that much of the information is based on the 1975 census data, despite 1984 publication. Publisher: Masson, 120, Bd Saint-Germain, 75280 Paris Cedex 06. Masson Publishing USA, Inc., 133 East 58th St., New York, NY 10022. About $28.

A more subjective view of demographic changes within the city is available from the Atelier Parisien d'Urbanism, 17, boulevard Morland 75181 Paris Cedex 04. Telephone (1) 271-28-14. One analysis, *Paris: Population et Logements, Situation 1982 et Evolution Recente*, , concludes that vacancy rates, principal residence classifications, and foreign population in the last census need further refinement. Priced at 100 ff or about $11.75. An earlier volume — *Vingt and d'evolution de Paris* — documents changes in each of the city's 20 arrondissements from 1954-1975.

*Les Chiffres Cles de l'Economie de l'Ile de France* (Key Figures of the Paris Region Economy) is published annually by the Institut d'Amenagement et d'Urbanisme de la Region Ile de France. The 1984 edition devotes one of 12 chapters to the service sector which is said to account for 75 percent of Parisian jobs. Write to the Institut at 21-23, rue Miollis, 7532 Paris Cedex 15. Price: 155 ff or about $18.25.

The city of Paris offers an extensive range of publications of interest to demographers and marketing researchers, among which are the *Annuaire Statistique* (Statistical Annual), *Prefecture de Paris*, and an 80-page thumbnail facts-and-figures compilation, *Paris en Chiffres*, both free. Write Marie de Paris, Hotel de Ville, Direction Generale de l'Information et des Relations Exterieurs, 75196 Paris R.P.. The city's Association for Municipal Information publishes Ville de Paris, a monthly general-interest magazine in French. Write or call city hall (telephone (1) 276-40-40) for foreign subscription information.

Highly recommended for an upbeat, urban-oriented view on what makes Parisians and their city compatriots tick: *Francoscopie — Les Francais: Qui Sont-Ils? Out Vent-Ils?* (loosely, The French: Who Are They? Where Are They Headed?) by Gerard Mermet in collaboration with the Advanced Communication Center. Liberally illustrated with charts and graphs from demographic sources and magazine articles, the volume has plentiful reproductions of print advertising and TV spots to amplify short, breezy texts. Published last spring by Larousse, 12, rue du Montparnasse, 75006 Paris. Telephone 325-81-44. Price: 89 ff (about $11.50).

Finally, the *International Herald Tribune* publishes the 200-page *French Company Handbook* giving vital data on 84 leading firms, basic facts on others, the economy, the stock market, and bilingual financial terms. Write: Book Division, 181 avenue Charles-de-Gaulle, 92521 Neuilly Cedex France. Telephone (1) 747-12-65. In New York City, phone (212) 752-3890. •

*—Peter Inserra*

*Peter Inserra is* International Demographics' *correspondent in Paris.*

# TIPS ON TRENDS

## THE ELUSIVE EXPATRIATES

Researchers grappling with the problem of learning how many U.S. citizens live in a foreign country will be interested in a booklet from the Population Reference Bureau, *The Elusive Exodus: Emigration from the United States*, by Robert Warren and Ellen Percy Kraly.

It cites the U.S. Department of State 1984 estimate of about 1.8 million U.S. citizens living abroad, not counting military personnel and their dependents.

Estimates for 1983 show that about 37 percent of expatriates lived in North and Central America and the Caribbean, with nearly 16 percent in Canada and 14 percent in Mexico. An estimated 9 percent lived in Latin America at that time. Nearly a third were in Europe. The largest groups were in West Germany, the United Kingdom, and Italy. Asian countries hosted nearly 16 percent of the expatriates, with large concentrations in the Middle Eastern countries of Saudi Arabia and Israel, the Philippines, Japan, Hong Kong, and Singapore. The remaining 8 percent were divided between Oceania and Africa.

Warren and Kraly discuss the deficiencies in available data about emigrants and suggest ways of filling the gaps, including adding questions to the census and to the Current Population Survey.

The 15-page publication is available for $4.50 including postage and handling from Circulation Department, Population Reference Bureau, P.O. Box 35012, Washington, DC 20013.

## JAPANESE HOUSING

New homes in Japan being purchased by the upper and middle class are growing in size and gaining in amenities, according to an article, "Trends in Japanese Housing," in the July/August issue of *real estate today*.

Just as the American home market is maturing to meet demand (see *American Demographics*, "The Good News About Housing," August, 1985) many new Japanese homes have larger square footage — up to 2,000 square feet, compared to previous living areas of 800 to 1,000 square feet — and amenities such as whirlpool baths, oak floors, extensive tilework, and efficient fireplaces.

Ranch-style homes are not common because they take up too much space, but two-story homes with four bedrooms on the second floor are. Rather than multipurpose rooms, new Japanese homes now often sport separate bedrooms, dining rooms, and living rooms. In some, a traditional tatami room provides a place to entertain Japanese visitors on special occasions.

Japanese yards are still small, according to author Bruce Townsley. "It is not uncommon to find 17 single-family units to the acre on scarce, buildable ground. Consequently, patios, decks, and other extensions of living space so common to American homes rarely occur in the Japanese home. Garages, too, are a rarity."

Townsley notes that last year Japanese built and sold twice as many new homes per capita as were built and sold in the United States. •

# DRINKING LIGHT AND HEALTHY IN JAPAN

Light-alcohol beverages and health drinks become more popular in Japan as young working women increasingly enjoy a liberated lifestyle characterized by a sharp sense of fashion and a strong orientation toward leisure.

The advertising for these drinks uses an image popular with today's Japanese youth — taking it easy in an avant-garde setting. The ads target one of Japan's strongest consumer groups — young working women who live at home with their parents. The roughly 8 million women between the ages of 20 and 30 make up nearly 7 percent of Japan's total population and 13 percent of all Japanese women.

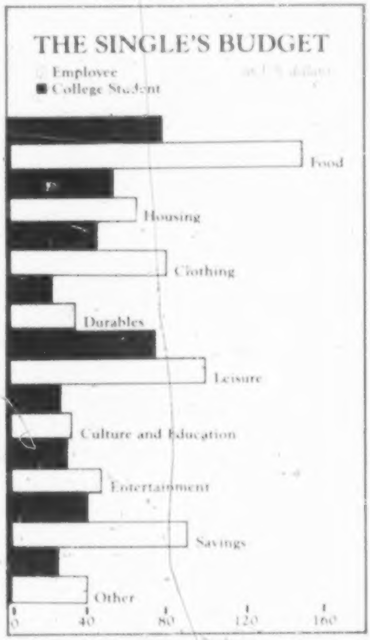
With marriage increasingly delayed to between ages 24 and 27, young women have a relatively large amount of discretionary income to spend on leisure, recreation, and entertainment. Typical female office workers often end their work day with an "evening out with the girls" for dinner or a trip to the health club before commuting home.

Newly-employed young men and university students also contribute to the sales of low-alcohol beverages. Although the incomes of university students and single workers differ significantly, their spending patterns and often their tastes are similar.

Recent issues of magazines targeted to Japan's young women teem with double-page spreads of new product announcements for light-alcohol drinks and draft beers in half-sized cans that fit discretely in the palm of a hand. These 2-to-7 percent alcohol drinks range from beer-soft drink combinations to wine coolers.

Packaged to appeal to both the pocketbook and demeanor of a young woman, Kirin's Palm Can draft beer fits a ladylike image and costs an economical equivalent of 55 cents for its tidy 180 ml. (about a cup). Spurred by market surveys showing that Japanese women often finish only half a regular-sized can of beer, the palm-sized can has also caught on at Suntory Ltd., Japan's largest bottler of whiskey and other beverages. Suntory's Penguin's Bar brand draft beer comes in a 135-ml. can as well as the more-standard 250- and 350-ml. sizes.

Another new release from Suntory is its beer-based foaming cocktail, Panache. At about 64 cents a 200-ml. can, Panache comes in lime, apple, or grape and has a 2 percent alcohol content. Sapporo Brewery's Squash Agatha brand also combines fruit juice and beer and contains less than 1 percent alcohol.



Source: Japan's Market Profile, [illegible]

Fruit juice and shochu (traditional distilled spirits) combinations are also popular new releases. Lovestar Three Nine, marketed by Miho Shurui, has a 7 percent alcohol content and comes in lemon and lime, grapefruit, apple, and plain. A 300-ml. bottle costs about 60 cents.

Many Japanese companies have joined the U.S. wine cooler craze, releasing products with names such as New hi Liki Wine Cocktail, Cool 2, Wine Cooler Monica, and Wine Cooler Cindy. The alcohol content of these new products ranges from 4 to 6 percent; they are priced at about 75 cents for 200 ml..

Long favorites among the middle-aged and elderly in Japan, health drinks now appeal to the young fitness enthusiasts as well. With expenditures on recreation and leisure averaging $80 a month, young working women belong to fitness centers and work out regularly, helping to create a market for all kinds of new health drinks.

About 30 makers already crowd the market for so-called "Vermont" drinks, known as those that have apple vinegar, rice vinegar, or vinegar plus honey as their main ingredient. Other drinks range from Chibikko 5, a lactic acid bacteria drink, to Calpis KK Oolong Tea.

More information about the Japanese consumer market, including statistical tables and commentary, is available in a new 32-page publication from Japan External Trade Organization — *Japan's Market Profile: A Look Into Japan's Marketplace for Consumer and Capital Goods*. In the words of the preface, it is "intended to provide a vivid and visual understanding of how the Japanese spend their time and — ultimately — their money." For a copy, write to JETRO, International Communication Department, 2-5, Toranomon 2-chome, Minato-ku, Tokyo 105, Japan; telephone 03-582-5511. ●

*Denise Rusoff*

*Denise Rusoff was formerly senior editor of the Japanese magazine, PHP, and is now vice president of Translations Nippon.*

# PUBLICATIONS

**Women at Work Special Issue —. Protection of Working Mothers: An ILO Global Survey (1964-1948),** 1984, Geneva: International Labor Office, 70 pp., 12.50 Swiss Francs. Order from ILO Publications, International Labor Office, CH-1211 Geneva 22, Switzerland.

In 1975, the total number of economically active women in the world was 575 million. The ILO estimates that by this year there will be 675 million women in the labor force. Thus, every year about 10 million women enter paid employment. The ILO projects that the number of new female entrants into the labor force will rise to 13 million a year from now through the rest of the century. The major change in recent years is among women aged 25 to 44 who have stayed in the labor force even when they have children at home. In developing countries the change has also been that women leave agricultural work to move to urban areas for better job opportunities.

This special issue reviews what has happened to women in the last two decades, focuses on events in some specific countries, and discusses labor law changes that have been made and need to be made to assure that the workplace accommodates to the needs of working mothers and their children.

A country-by-country chart summarizes the laws and regulations governing maternity protection.

**Population and Survival: The Challenge in Five Countries,** by Georgia Lee Kangas, 1984, New York: Praeger Publishers, 1984, 249 pp., $37.95. Order from Population Communication, 1489 East Colorado Blvd., Suite 202, Pasadena, CA 91106.

The population problems and successes of India, the Philippines, Egypt, Bangladesh, and Mexico are described in this book. The introduction makes clear why people in the United States should care about population in foreign countries.

For example, Robert Gillespie of Population Communication states in his introduction that, "people in the United States have vital national security interests and heavy financial commitments in both Egypt and the Philippines. If, due in part to rapid urbanization or uncontrolled population growth, the population problem destabilizes these countries, the impact on the United States would be profound. If, due to a disenfranchisement of the middle class, unabated inflation, and a lack of jobs, Mexico becomes the next Iran, there would be a flood of refugees and illegal immigrants into the United States."

This is one of the more up-to-date reviews of the subject in each of these countries, with the 1980-round of census data the basis for much of the discussion.

**Circulation in Third World Countries,** by R. Mansell Prothero and Murray Chapman, 1985, Boston: Routledge & Kegan Paul, 1985, 469 pp., $59.95. Order from Routledge & Kegan Paul, 9 Park St., Boston, MA 02108.

This book uses case studies to describe "circulation" in the Third World. According to the authors, circulation occurs when "people move from their places of residences for varying periods of time but ultimately return to them," and it is in this way that circulation is different from migration.

The moves may be motivated by changes in the seasons, religious beliefs, or by the lure of different marketplaces for such workers as wandering shoemakers. Some economic factors usually lie behind circulation.

This book presents a collection of essays that serve as case studies of different kinds of circulation movements and examples of moves motivated by economic opportunity. The book may be useful to those trying to understand the economic circulation within countries such as Ecuador, Kenya, India, East Africa, Indonesia, and Peru.

**Adolescent Fertility: Worldwide Concerns,** by Judith Senderowitz and John M. Paxman, 1985 Washington, D.C.: Population Reference Bureau, 1985, 50 pp., $4.00. Order from Population Reference Bureau, 2213 M Street N.W., Washington, DC 20037.

What happens with teenage childbearing in developing nations is particularly important for world population growth, according to the authors of this bulletin. Eighty-two percent of the world's 245 million women aged 15 to 19 live in developing countries and this number is projected to go up another 75 million in the next 35 years even though the numbers of women this age will decline slightly in developed nations as a whole.

In much of Africa, Asia, and Latin America where early marriage and childbearing are still the norm, birthrates of women aged 15 to 19 are far over 100 births per 1,000, the authors report, although the birthrate is just 15 in China, the world's most populated country. These rates are generally low in developed countries — 4 births per 1,000 in Japan, 9 in the Netherlands. However, many developed countries and some developing countries experiencing rapid urbanization are concerned about the growing proportion of teenagers' births that occur out of wedlock — 51 percent in the United States and 52 percent in England and Wales in 1982 — and unmarried teenagers' increasing reliance on abortion.

This trend is linked with more and earlier premarital sexual activity, fostered by the lengthening "bio-social gap" between puberty and marriage, the loosening of traditional parental and social controls, and increasing peer and media pressures to be sexually active.

**Censuses of Asia and The Pacific, 1980 Round,** edited by Lee-Jay Cho and Robert L. Hearn. Honolulu, Hawaii: East-West Population Institute, 380 pp. No price given. Order from Publications Orders, East-West Center, 1777 East-West Road, Honolulu, HI 96848.

A country-by-country summary of the topics covered in the 1980 round of censuses. A handy reference chart at the beginning of the book shows the census date and indicates the data items that were collected. For example, a glance shows that Australia, Japan, New Zealand, and Sri Lanka collected information from all respondents on how they travel to work, and that the United States, Singapore, and Korea collected that information only from a sample of households. The other countries did not collect travel-to-work data. The book does not provide any data, but only information about the census collection process. •

FEATURE

# FRANCHISING ABROAD: "BITE THE WAX TADPOLE"

Turning a profit in overseas franchising takes good organization, flexibility, and a long-term commitment.

Speakers at a two-day session organized by the International Franchise Association said most of their companies went overseas by accident. However, all recommend that a move abroad would be smoother if it was planned and the markets chosen carefully.

John R. Moore, president of Midas International, suggested that companies resist the temptation "to jump into what appears to be a unique opportunity. There is no shortcut to structuring a proper company."

Several executives cited instances where their companies had jumped into a foreign market at someone else's invitation without doing their own market research. "Three days wandering around the streets of Tokyo doesn't provide sufficient market research to make a good decision," said one.

Anthony Thomas, executive vice-president of Kentucky Fried Chicken International, said that the total corporation must be prepared to wait for the pay-off because franchising overseas may be a drain on profits in the early years. KFC, for example, took six years to make a profit in Japan and four years to break even in Europe, he said.

The same demographic factors that make Kentucky Fried Chicken successful in the United States have contributed to its success in Europe and Japan — shorter work weeks, women working outside the home, increased disposable income, and a young population that "leapfrogs" established ways of doing things and tries new products. In addition, Thomas said, "Chicken is popular everywhere."

When you enter a different culture with your franchise, Thomas said, there is enormous pressure to deviate from the original idea under the guise of cultural differences or local preference. But franchisors should resist. "Stick to your high standards," he said, citing Kentucky Fried Chicken's emphasis on quality, service, and cleanliness.

At the same time, Thomas mentioned some areas where changes have had to be made to conform with local concerns. For example, the equipment used to pressure-fry chicken has to be modified to meet West German standards which are more stringent than those in the United States. Power supplies often dictate the adaptation of equipment as well. The "11 herbs and spices" of Colonel Sander's original recipe sometimes differ from country to country, but each combination must be tested and approved by the franchisor.

Maury C. Roe, vice-president and director of market development for the Coca-Cola Company — a franchisor in 155 countries — said that the first step in entering a foreign country is to "define your business — very specifically — in terms of the country you propose to enter. For whom do you want to do what? When? Where? How? And why?"

He said, for example, that while the Southland Corporation (7-Eleven stores) is very successful with convenience stores in Japan, their success is due to their recognition that a convenience store is different in Japan than in the United States.

"In this country, it's a small grocery and specialty store that's located convenient to automobile traffic, with parking, and a limited array of products sold at premium prices. The concept would fail in Japan!

"Many people there don't have cars. Parking is at a real premium. People don't shop there the same way they do here. In Japan, the average housewife shops two, maybe three times a day, usually within 100 to 200 meters of her home, in a very urban, densely populated area. She uses the store as her pantry," Roe explained.

"The key," he said, "is that Southland knows its business is providing convenience to the consumer. But at the same time, the company was able to maintain the concept and redefine convenience stores for the Japanese market."

Roe also suggests that companies not think in terms of "going international," but rather in terms of specific cities and countries.

"Remember back to the time when you began to think about getting married?" he asked. "I'll bet you didn't think 'I want to get married,' but 'I want to marry Sue . . . or John.'"

While all the speakers said that international franchising is unlikely to pay off immediately, none suggested staying away from foreign countries. The Coca-Cola Company, for example, earns half its profits from its overseas business.

For information about franchising both domestically and internationally, contact the International Franchise Association, 1350 New York Avenue, NW, Suite 900, Washington, DC 20005; telephone (202) 628-8000. •

—*Doris Walsh*

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# INTERNATIONAL DEMOGRAPHICS

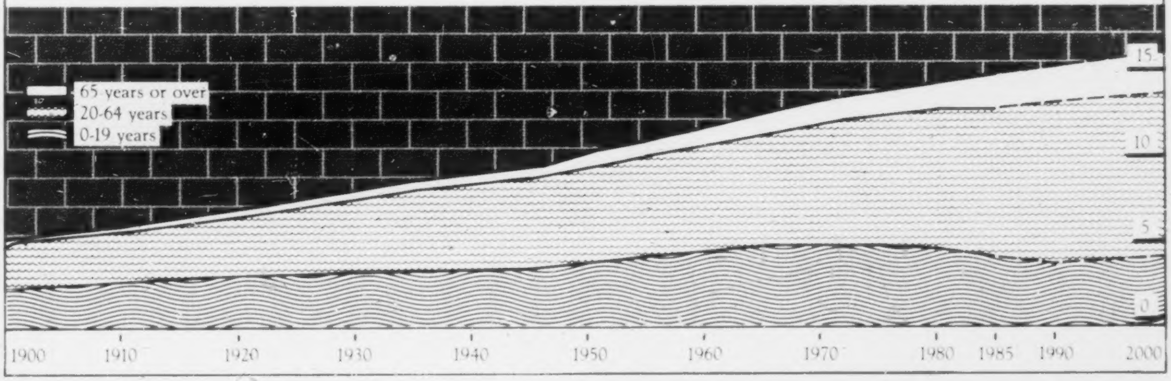
CONSUMER ■ TRENDS ■ AND ■ MARKETS ■ ABROAD

DECEMBER 1985

VOLUME 4, NUMBER 12

POPULATION BY AGE GROUPS IN THE NETHERLANDS, 1900-2000

(in thousands)



## COUNTRY PROFILE

# THE NETHERLANDS

The saying, "One Dutchman is a philosophy, two is a club, three is a political party, or a religious denomination," aptly characterizes the Dutch as rugged individualists. The ease with which such rugged individuals coexist with one of the world's most elaborate welfare systems, supported by tax rates that Americans might consider extortive, is one of the Netherlands' apparent contradictions.

The Dutch proudly refer to themselves as the world's most cooperative individualists. Another contradiction is the fact that one of the world's most densely populated countries (1,098 inhabitants per square mile in 1984) is also the second largest net exporter of agricultural products, preceded only by the United States.

As a small, mineral-poor country with a seafaring tradition, the Netherlands survives on foreign trade. In 1983, total export earnings amounted to nearly 62 percent of the entire national income. Over 72 percent of Dutch exports go to other member countries of the European Economic Community (EEC), but imports are more diversified, with 47 percent originating outside the EEC. The U.S. supplies 9 percent of all Dutch imports, making it the fourth largest supplier, after West Germany, Belgium, and Luxembourg. The Netherlands' main export markets — West Germany, Belgium, Luxembourg, and France — accounted for $35.9 billion out of a total of $65.6 billion in 1983. Holland is the seventh largest U.S. export market.

Take the name "Netherlands" or "Low Countries" literally. Half the country, containing 60 percent of its population, is below sea level, protected by a range of dunes and dikes. Higher elevations lie only in the south and east, with the highest point of the country, on the border with Belgium and West Germany, rising to a modest 1,053 feet. Consequently, struggling with the sea recurs throughout Dutch history.

Even before this century, some 450 square miles of marshes and lakes, the so-called polders, had been reclaimed. A reclamation project undertaken during the 1930s — the closing of the former Zuiderzee (Southern Sea, now called IJsselmeer, or Lake IJssel) — made it possible to recover substantial stretches of agricultural and recrea-

*continued*

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**THIS MONTH: NETHERLANDS**

## PROVINCES OF THE NETHERLANDS: POPULATION, HOUSEHOLDS, DENSITY, AND ANNUAL GROWITH RATE

| | *Population in 1984* | *Households in 1984** | *Population Density in 1984* | *Annual Growth Rate 1983-84* |
|---|---|---|---|---|
| 1. Groningen | 561,500 | 216,000 | 621.3/sqm. | 0.1% |
| 2. Friesland | 597,200 | 210,300 | 463.4 | 0.3 |
| 3. Drenthe | 427,300 | 147,300 | 416.8 | 0.6 |
| 4. Overijssel | 1,042,100 | 348,500 | 706.8 | 0.4 |
| 5. Gelderland | 1,735,800 | 604,800 | 898.3 | 0.5 |
| 6. Utrecht | 929,400 | 341,700 | 1,807.0 | 0.7 |
| 7. Noord-Holland | 2,307,400 | 904,900 | 2,239.4 | 0.0 |
| 8. Zuid-Holland | 3,139,200 | 1,189,100 | 2,796.0 | 0.3 |
| 9. Zeeland | 355,500 | 130,200 | 515.2 | 0.2 |
| 10. Noord-Brabant | 2,103,000 | 703,300 | 1,097.7 | 0.4 |
| 11. Limburg | 1,083,600 | 378,900 | 1,291.9 | 0.3 |
| 12. Almere** | 33,000 | NA | 577.3 | *** |
| 13. Dronten** | 22,200 | NA | 173.5 | 3.3 |
| 14. Lelystad** | 55,100 | NA | 528.1 | 5.4 |
| 15. Zeewolde | 800 | NA | 10.4 | *** |
| Total | 14,394,600 | 5,215,400 | 1,097.7 | 0.4 |

* *Projected from 1981 data*
** *Centrally administered territories*
****Administrative divisions not in existence in 1983*

*Source: Central Bureau voor de Statistiek, Statistisch Zakboek, 1984; Huishoudens, 1981*

tional land. Four polders, with a total area of 637 square miles, have been pumped dry since the Zuiderzee was sealed off; whether a fifth should follow is still under discussion. A more recent project, the Delta Plan, started in the aftermath of the great flood of 1953 and to be completed by 1986, aims at shortening and reinforcing the vulnerable southwestern coastline.

Since 1848, the Netherlands has been a constitutional monarchy with a parliamentary form of government. As such, it is one of the most stable democracies in the world. The present queen, Beatrix, assumed her largely ceremonial position in 1980. Actual political power rests with the prime minister and his Council of Ministers which is nominated by the queen, but responds to the Parliament. Although the Netherlands is notorious for its proliferation of small parties, three parties — the Social Democrats (PvdA), Christian Democrats (CDA), and Conservatives (VVD) — dominate the political scene. The present government, elected in 1982, is a coalition of Conservatives and Christian Democrats, under the leadership of Prime Minister Ruud Lubbers (CDA).

### CITIES AND REGIONS

With a total land area of 14,580 square miles, the Netherlands just slightly surpasses Massachusetts, Connecticut, and Rhode Island taken together. The main administrative units are the 11 provinces, of which Noord-Holland and Zuid-Holland are the most populous and economically most important — one reason the name "Holland" is identified with the country as a whole. In addition, four centrally administered territories are located in the Flevoland polders.

Below the provincial level, the country is divided into administrative units of different sizes serving different purposes. The largest are the 40 regional divisions or COROP areas; the smallest are the 749 *gemeenten* or communities, each headed by a *burgomaster*, or mayor, appointed by the queen. Although Amsterdam is the capital, the Parliament and Ministries are located in The Hague. The queen lives in Soestdijk, near Utrecht.

Amsterdam remains the commercial center of the country, but its role as the principal port city has been taken over by Rotterdam, which is also the focal point of the country's main industrial complex and the world's principal spot market for oil products. The area to the west of the city, the so-called Europort complex, houses many petrochemical industries. Other industrial centers of some importance are Zaandam and Ijmuiden, to the north and west of Amsterdam; the city of Eindhoven in Noord-Brabant, the home of the Philips Electronics Corporation; the former coal mining area in the south of Limburg; and the Twente area in the eastern part of Overijssel. The northern province of Groningen is economically important for its production of natural gas, at present the most important element in the country's energy balance, supplying 46 percent of the Netherlands' energy needs in 1981.

Although no community has more than 700,000 inhabitants, the country as a whole is highly urbanized because of the large number of medium-sized cities, especially in the west. The half circle that stretches from Utrecht and Hilversum to Amsterdam, Zaandam, Haarlem, IJmuiden, and then south to Delft, The Hague, Schiedam, Rotterdam, and Dordrecht is virtually one large conurbation, known as the "Randstad Holland," or roughly translated "Fringe-City Holland." After London, Paris, and the German Rhine-Ruhr area, it is the fourth largest continuous urban area in Western Europe. Once it was expected to engulf all of Zuid-Holland, as well as parts of Noord-Holland and Utrecht, but with the help of spatial planning and a slower population growth, this encroachment has not materialized.

The province of Zuid-Holland still maintains a central core of pastures, casually known as "the green heart of Holland." Nevertheless, the penetration of urban infrastructure and life styles in the rural areas is intense. Dutch statistical sources therefore distinguish between rural communities,

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**PUBLISHER:** *Peter Francese* **EDITOR:** *Doris L. Walsh*
**MANAGING EDITOR:** *Caroline Arthur* **ART DIRECTOR:** *Carol Terrizzi*

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which numbered 218 in 1984 and contained 12 percent of the population; urbanized rural communities, which numbered 414, with 37 percent of the population; and urban communities, which numbered 117, with 51 percent of the population. Distinctions are made on the basis of number of inhabitants, economic function, and economic activity of the population. Urbanized rural communities, for instance, are those with less than 30,000 inhabitants, less than 20 percent of their male labor force in agriculture, and no specific urban functions. In 118 of these communities, at least 30 percent of workers commute to their workplace.

## POPULATION GROWTH

Partly because the Dutch are generally uncomfortable with large centralized personal data bases, the Netherlands has not published a complete population census in recent years. Paradoxically, however, it is one of the countries where population data are most complete and up-to-date, thanks to the continuous registration system. At birth or immigration, basic statistical data for each resident is recorded and kept on file at the city hall of the resident's community. When changing residence, Dutchmen are required to notify the city hall, so that their registration cards can be updated or transferred.

In 1983, the Netherlands counted 14.34 million inhabitants, compared to 5.10 million at the turn of the century, an average annual growth rate of about 1.2 percent. Although fairly low by U.S. standards, this growth rate surpasses those of surrounding countries due to Dutch fertility having remained fairly high until the mid-1960s.

In 1965, the total fertility rate (the mean number of live births up to the end of a woman's reproductive period) was 3.0, higher than anywhere else in the EEC, with the exception of Ireland. This distinction is sometimes attributed to the presence of a substantial Catholic minority in the south of the country. As in many other developed countries, women bear children quite late, with a mean age at first childbirth of almost 26 years. Since the 1960s the birth rate has dropped sharply to 11.3 per 1,000 in 1983 and Dutch fertility is now one of the lowest in Europe.

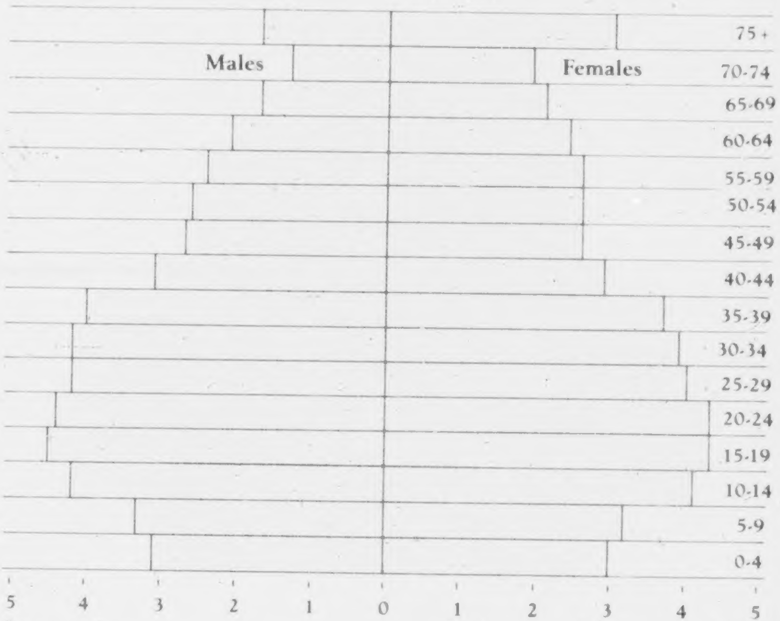
Meanwhile, the death rate has virtually stabilized at 8 per 1,000. The Dutch life expectancy, which was about 65 years in 1930, now stands at 72.7 years for men and 79.4 for women (1983), about 1.5 years higher than in the United States. Much of the improvement stems from the reduction of infant mortality to 8.3 per 1,000 live births. Women have shown greater gains in life expectancy than men with the result that the percentage of widows, which rose from nearly 7 percent of women in 1965 to nearly 9 percent in 1983, is expected to reach nearly 10 percent by the year 2000.

Natural increase has already dropped to a mere 0.4 percent a year. With emigration fairly stable at 4 to 5 per 1,000 since 1975, and an immigration rate that diminished from 9 per 1,000 in 1975 to 5 in 1983, the total growth rate in 1983 also fell to 0.4 percent.

Apart from the slight impact of net immigration, the positive growth rate reflects the large proportion (53 percent) of the population in its reproductive years. But like other developed countries, women are bearing fewer children and having them later in life. The mean age for the birth of a first

## POPULATION OF THE NETHERLANDS BY AGE AND SEX: 1983

(in percent)



| Age | Total | Males | Females |
|---|---|---|---|
| All Ages | 14,339,551 | 7,102,598 | 7,236,953 |
| 0-4 | 883,494 | 451,663 | 431,831 |
| 5-9 | 927,452 | 474,453 | 452,999 |
| 10-14 | 1,192,172 | 609,272 | 582,900 |
| 15-19 | 1,249,642 | 639,820 | 609,822 |
| 20-24 | 1,242,438 | 632,498 | 609,940 |
| 25-29 | 1,173,392 | 598,028 | 575,364 |
| 30-34 | 1,158,992 | 595,539 | 563,453 |
| 35-39 | 1,101,954 | 568,694 | 533,260 |
| 40-44 | 854,417 | 441,089 | 413,328 |
| 45-49 | 768,105 | 391,297 | 376,808 |
| 50-54 | 751,424 | 373,702 | 377,722 |
| 55-59 | 707,330 | 340,816 | 366,514 |
| 60-64 | 640,625 | 300,592 | 340,033 |
| 65-69 | 544,355 | 244,784 | 299,571 |
| 70-74 | 458,070 | 191,705 | 266,365 |
| 75+ | 685,689 | 248,646 | 437,043 |

*Source: Centraal Bureau voor de Statistiek, Statistisch Zakboek, 1984* child is almost 26 years. The Netherlands' long-term population trend is one of decline, with a total fertility of 1.45 in 1983, the fourth lowest in the EEC. According to the current medium variant calculated by the Central Bureau of Statistics (CBS), the Dutch population is expected to reach 15 million by 1990 and peak at slightly less than 16 million around the year 2005, after which it will slowly begin to decrease.

Although regional differences are not pronounced, some should be noted. After having been a net recipient of internal migration until the 1960s, the "Randstad Holland" is now losing population. The growth of Noord-Holland and Zuid-Holland has all but stopped. Of the 10 largest cities, only Groningen and Enschede have grown in recent years. Population losses are particularly marked in Amsterdam, which now loses about 2 percent of its population a year, primarily among families with small children, who are looking for a better quality of life.

At the same time, the cities attract young adults. Already, the age structure of the cities with over 100,000 inhabitants is biased towards the 20-to-29 and over-55 age groups, which account for 19 and 26 percent of their population, respectively, compared to 16 and 20 percent in the rest of the country. The 0-to-19 age group is rather underrepresented, with 24 percent of the population, against 32 percent in the rest of the country. In the near future, the highest growth rates are expected in the provinces of Friesland, Zeeland, and Noord-Brabant, stimulated in part by a government-sponsored decentralization policy.

## HOUSEHOLDS AND FAMILIES

Both in terms of its median age (32 years in 1983) and its percentage of elderly (nearly 12 percent, expected to rise to 14 percent by the year 2000), the Dutch age structure is similar to that of the United States. It is, however, younger than the age structure of some neighboring countries, such as West Germany. Due to the recent drop in the birthrate, over a third of the population is now between 15 and 34 years old, whereas children under age 10 make up only 13 percent of the total.

As in other industrialized countries, household size in the Netherlands has been declining for some time, from a mean of 3.6 in 1960 and 3.2 in 1970 to 2.6 in 1983. A declining birthrate, increasing numbers of households, growing numbers of the elderly and the divorced, and especially the greater independence of young people all contribute to this trend. The percentage of one person households increased from 12 percent in 1960 and 17 percent in 1970 to 22 percent in 1983. The rise is observed in all age groups, but particularly among those under age 35 and over 75. At the same time, non-family types of households are gaining importance, from 3 percent in 1960 to 5.6 percent in 1981.

☐

**"ALREADY THE AGE STRUCTURE OF CITIES WITH OVER 100,000 PEOPLE IS BIASED TOWARD THE 20-TO-29 AND OVER-55 AGE GROUPS."**

☐

Mean household sizes in the 11 provinces vary from 2.5 in Noord-Holland (in 1981) to nearly 3 in Overijssel and Noord-Brabant, whereas the proportion of one-person households ranges from 16 percent in Drenthe and 17 percent in the somewhat traditionalist southern provinces of Limburg and Noord-Brabant to 27 percent in Noord-Holland and 28 percent in Groningen. The largest cities, particularly those with an important student population, tend towards small households. Forty-five percent of Groningen households, for example, are one-person households. Amsterdam has 39 percent of its households with only a single member.

Despite a relative surplus of young adults, the Dutch marriage rate fell from 9.5 per 1,000 inhabitants in 1970 to 5.5 in 1983. Young couples — especially those who are highly educated, leftist in political orientation, and who live to the west and north — choose increasingly to live together without being formally married. Informal unions are less common among youth with strong religious convictions. The percentage of married men aged 25 to 29 dropped from 73 percent in 1970 to 56 percent in 1983; for women, the decline was from 84 percent to 71 percent. A 1982 survey showed that about 18 percent of female 22-to-23-year-olds lived in some kind of informal union. Marriage was more likely for older women. The proportion of women living with their legal husbands leveled off by age 30, at slightly over 80 percent.

After declining for some time, the mean age at first marriage has been rising slowly since the mid-1970s; in 1982, it was 26 years for men and 24 years for women. The CBS forecasts that the percentage of those reaching age 50 without ever having married will increase from 7 percent in 1980 to 11 percent by the year 2000. Divorces are becoming more common and many divorced persons do not remarry. Between 1970 and 1983, the percentage of divorces rose from 0.7 percent of all men and 1 percent of all women to 2.5 and 3 percent, respectively. By the year 2000, the numbers are expected to be nearly 5 and 6 percent. However, with a divorce rate of 2.3 per 1,000 inhabitants, the Netherlands maintains more marital stability than the United States, where the rate was 5 per 1,000 in 1982.

## HOUSING, CONSTRUCTION, AND SPATIAL PLANNING

Only 26 percent of Dutchmen own their own homes as compared to 34 percent of West Germans, 35 percent of Swedes, 4[illegible] percent of Frenchmen, and 46 percent of Englishmen. Typically, Dutch families rent their ho[illegible] often from government or quasi-government agencies. With no shortage of family homes at present, the declining birthrate makes future housing crunches unlikely.

The trend towards new living arrangements has, however, created a demand for small living quarters to accommodate special groups, such as unmarried adolescents, the elderly, and the growing number of divorced and other single adults. The bleak apartment buildings at the edges of the large cities provide needed physical space, but stand mute to the demand for present living environments. Finally, the largest cities, especially Amsterdam, are losing families and attracting young people, requiring a reformulation of housing priorities. In areas lacking sufficient low-cost housing for young people, empty buildings are often illegally occupied by groups of squatters, or krakers. Official attempts

# AT A GLANCE: THE NETHERLANDS

**Fastest Growing Cities**

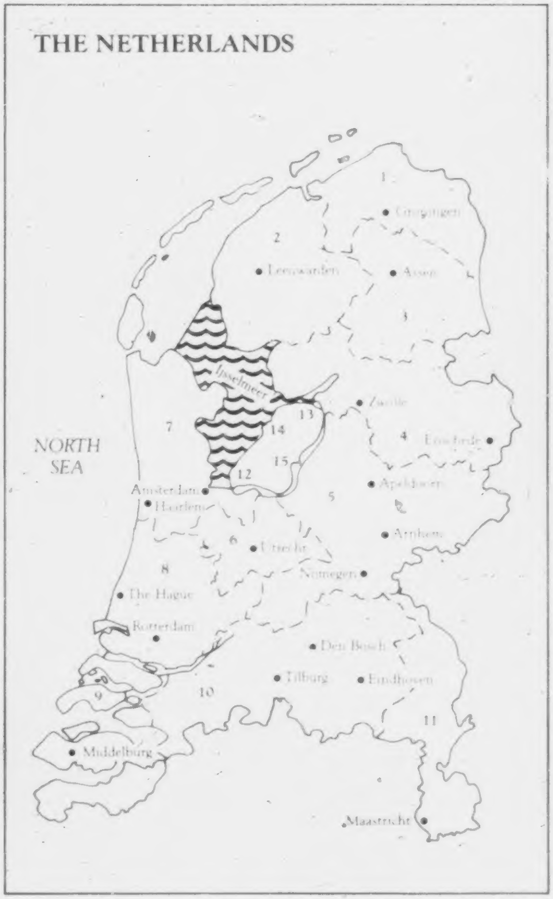
Groningen
Enschede

**Most Populous Provinces**

Noord-Holland
Zuid-Holland

**Fastest Growing Provinces**

Friesland
Zeeland
Noord-Brabant


THE NETHERLANDS
NORTH SEA
Ijsselmeer
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
Groningen
Leeuwarden
Assen
Zwolle
Enschede
Apeldoorn
Arnhem
Amsterdam
Haarlem
Utrecht
Nijmegen
The Hague
Rotterdam
Den Bosch
Tilburg
Eindhoven
Middelburg
Maastricht

**Smallest Household Size (Cities)**

Groningen
Amsterdam

**Largest Household Size (Provinces)**

Noord-Holland
Overijssel
Noord-Brabant

**Largest Cities**

Amsterdam
Rotterdam
The Hague

## PROVINCES

*WEST*
6. Utrecht
7. Noord-Holland
8. Zuid-Holland

*SOUTHWEST*
9. Zeeland

*SOUTH*
10. Noord-Brabant
11. Limburg

*NORTH*
1. Groningen
2. Friesland
3. Drenthe

*EAST*
4. Overijssel
5. Gelderland

## CENTRALLY ADMINISTERED TERRITORIES

12. Almere
13. Dronten
14. Lelystad
15. Zeewolde

to dislodge these occupants have led to occasional housing riots.

Considering the density of settlement, it is not surprising that spatial planning is a dominant concern in the Netherlands. Eight percent of Dutch soil is taken up by constructed area (1983), 9 percent by water, 12 percent by woods and wastelands, and 65 percent by agriculture. In Zuid-Holland, Noord-Holland, Utrecht, and Limburg, the proportion of constructed area exceeds 10 percent.

The State Service for Planning (RPD) offers advice and coordinates planning efforts of provinces and local governments. One of RPD's top priorities is to create a balance among business, industrial, residential, and recreational areas in the densely settled western section of the country. For this purpose, the new Zuidelijk Flevoland polder will primarily be used to create residential and recreational outlets for the Amsterdam area, rather than new agricultural land, as in earlier polder development projects. The polder city of Almere was planned as a satellite community for Amsterdam. A connecting railway is under construction.

### ETHNICITY AND RELIGION

Although the Netherlands has both linguistic and religious minorities — the Frisian language in Friesland Province and Catholics in Noord-Brabant, Limburg, and parts of Zeeland, Gelderland, and Overijssel — the Netherlands has historically been a nation of little ethnic, religious, or cultural conflict. Frisian, a Germanic language leaning somewhat towards English, is taught in Friesland schools, next to Dutch, which is the official means of communication. Thirty-eight percent of the population is registered as Catholic, 22 percent as Dutch Reformed, 9 percent as Protestant, and 5 percent as belonging to other creeds. About 27 percent of the population has no religion.

Until recently, the Netherlands was characterized by its compartmentalized social structure. Catholics, Protestants, and even the socialists tended to have their own networks of social organization. For example, Protestants traditionally went to Protestant schools, were members of Protestant clubs and labor unions, read a Protestant newspaper, and bought in the stores of other Protestants.

Since World War II, the social structure has become more open. Nevertheless, the compartmentalization survives in certain aspects of everyday life. Some companies, such as the large C&A department stores, are known for giving preference to employees of a given religion. Schools at all levels continue to be organized along religious lines, even though religion as such may occupy only a minor part of their curriculum. The Free University at Amsterdam still maintains explicit, though somewhat weakened, links with the Protestant creed, whereas the Universities of Tilburg and Nijmegen reflect a distinct Catholic orientation.

Ethnically, Dutch society has diversified in recent years, due to the migration that followed the independence of Surinam, and especially the influx of "guestworkers." Since the 1960s, net immigration has greatly increased. Like several other European countries, the Netherlands opened its doors to temporary migrants from Southern Europe, Turkey, and North Africa to keep up a steady supply of low-paid unskilled labor. Although the policy has now been discontinued, some migration continues as foreign workers send for their families and settle permanently in the Netherlands. In 1983, the country counted 546,500 foreign nationals (about 4 percent of the population). This number does not include the roughly 140,000 immigrants who left Surinam before its independence in 1975 and who held Dutch citizenship. Although immigration from Surinam continued after 1975, it has declined since 1981 when an entry visa requirement for Surinamese citizens was adopted.

Due in part to a preference to remain in the Netherlands over returning home, the largest group of foreigners are the Turks (154,200 in 1983), followed by the Moroccans (101,500). Fewer workers were attracted from Spain, Portugal, and Yugoslavia, and many have now returned to their homelands. Finally, the Netherlands counts some 150,000 citizens from other EEC countries, especially West Germans (44,300) and British nationals (41,300). The number of U.S. citizens is small: 9,700 in 1983.

Although the percentage of foreigners in the Netherlands is lower than in West Germany, France, or Switzerland, the distinct religious and cultural

## TIPS ON TRENDS

### WHAT'S HAPPENING TO WINE DRINKING

While wine consumption per capita in most European countries and in the United States increased rapidly in the last 20 years, in three of the largest wine-producing countries — France, Italy, and Portugal — it decreased during the same period.

A report in *World Health Statistics* (Vol. 38, No. 2, 1985) discusses the data available on the consumption of wine, beer, and spirits. There are definite findings that problems with alcohol increase in a country as local production of alcohol increases.

In 1965 and 1980 — the two years for which data are compiled — Europe and North America accounted for two-thirds of the world's total production of alcohol. Growth in consumption in some developing countries is now more rapid than in developed countries, but part of the reason is that commercially produced beverages — especially beer — are just beginning to be made and distributed in these countries.

### NOBLESSE OBLIGE . . .?

"Di is doing it." That's how some of the European continent's popular newspapers are headlining Britain's minor baby boom.

Nine months after the birth of Prince Henry to Princess Diana and Prince Charles of Britain's royal family — that is, by early last July — loyal subjects had produced 698 more babies than at the same time last year. At mid-year, 12,833 births had been recorded.

Some are not following the royal lead. Divorces in England and Wales were up 6 percent in 1984 to 179,000 according to government figures released in mid-August. A new law permitting divorce after one year of marriage is said to be partially responsible for the increase. ●

—*Peter Inserra*

characteristics of some of these groups, together with sobering economic prospects, cause some social tensions. These tensions are aggravated by the disproportionate settlement of immigrants in the largest cities, often in specific neighborhoods. The size of the typical Moroccan family particularly (total fertility rate of 6.3 in 1982) does not adapt well to the small size of modern Dutch family housing. The danger of ghettoization is clearly present as, for example, in Amsterdam where blacks — now 6 percent of Amsterdam's total population — live largely in the suburb of Bijlmermeer.

### EDUCATION

The central government finances education at all levels, making education and science the second largest budget item (19 percent), preceded only by welfare and social policy (22 percent). However, often private organizations with particular or philosophical objectives actually administer the schools.

Education until age 16 is compulsory and free. Thereafter, an annual tuition up to 500 guilders (about $150) may be charged. The Netherlands offers only one type of primary education, but at the secondary level offers four-year programs (LBO and NAVD), a five-year program (HAVD), and six-year programs (Atheneum and Gymnasium). Only students enrolled in six-year secondary schools can attend the universities. All other students can follow up high school by taking vocational or professional training.

Of the Netherlands' eight universities, the University of Leiden is the oldest and most traditional. Amsterdam is home to two universities while Groningen, Nijmegen, Utrecht, Rotterdam, and Maastricht host one each. Technical colleges are found in Delft, Enschede, Eindhoven (engineering), Wageningen (agriculture), and Tilburg (economics and social sciences).

As in other European countries, primary school enrollment in the Netherlands has declined in recent years, due to the drop in the birthrate. In 1975, the Netherlands' 9,453 primary schools educated 1.5 million students. By 1983, the number of schools had grown to 9,606, but the number of students fell to 1.2 million. A smaller decline, from 519,000 to 397,000, occurred among preschoolers. The 3,384 secondary schools, with their 1.5 million students, have only begun to face declining enrollments in the past two or three years. Institutions of higher education, which grew explosively during the 1960s, counted 307,000 students in 1983, a number that should begin to shrink by the end of the decade. Dutch universities still have more men than women: in 1983, 35 percent of all students were women, up from 25 percent in 1975.

### LABOR FORCE AND INCOME

In 1983, the economically active population consisted of 3.8 million men and nearly 2 million women, or about 41 percent of the total population. Despite the bulge in the Dutch population of those in their productive years, this percentage is somewhat lower than in the United States (48 percent in 1982), due primarily to the smaller proportion of economically active women in the Netherlands (27 percent, compared to 40 percent in the U.S.). The Calvinist tradition of a woman's place in the home, as well as sharply decreased economic opportunities in recent years, conspire to keep women out of the labor force.

The Netherlands' 1960s labor shortage was over by 1970 when the country began to face increasing unemployment, aggravated by the mid-1970s recession. Dependent as it is on foreign trade, the Netherlands was severely hit by the international economic crisis and its concomitant downturn of export opportunities. Depending on the definition adopted, the overall unemployment rate ranged from 13.7 to 17.1 percent in 1983. The 15-to-24 age group accounted for a whopping 40 percent of all unemployed in 1983.

As elsewhere, the proportion of the economically active population in Dutch agriculture has diminished during the past half century. In 1930, it was still about 20 percent, but by 1983 primary activities provided employment for less than 2 percent of the working population. Nevertheless, agriculture produced 4 percent of the national income, whereas unprocessed agricultural products accounted for nearly 7 percent of all export earnings. Dutch dairy products, flowers and bulbs and horticulture are well known, but few associate chickens with Holland even though Dutch

## TIPS ON TRENDS

### TWO INTERNATIONAL RESEARCH COMPANIES JOIN

SRG International and NFO International have joined forces. The new company, called NFO/SRG International Ltd. and headquartered in North White Plains, New York, will be one of the largest international market research consultancies operating from the United States.

Jerry Stafford, who established SRG International in 1981, will serve as president of the new company. Joining the NFO/SRG International Board will be Dick Chay, currently NFO senior vice-president for marketing, and Alan Harvey, NFO senior vice-president for finance and strategic planning. Harvey formerly served as joint managing director of Research Surveys of Great Britain (RSGB).

NFO/SRG International Ltd. will use the resources of the AGB worldwide group of market research companies. AGB is among the world's five largest market research organizations.

### HIGHER EDUCATION IN EUROPE

In 1980-81, in the countries of the European Community, 18.2 percent of young men aged 21 were enrolled in higher education. In 1970-71, only 15.8 percent of men that age were enrolled in college.

For 21-year-old women, only 9.3 percent were in college in 1970-71, whereas 13.4 percent were in college ten years later.

### CONFERENCES

"Problem Solving in Industrial Marketing" and "Qualitative Methods of Research: A Matter of Interpretation," are two seminars that will be presented by the European Society for Opinion and Marketing Research in February. For further information, contact ESOMAR Central Secretariat, J.J. Viottastraat 29, 1071 JP Amsterdam, the Netherlands; telephone (020) 64.21.41. •

poultry production is one of the world's largest. The Netherlands also produces beef mostly through intensive agro-industrial forms of cattle rearing. In 1983, meat exports amounted to nearly $2 billion.

The manufacturing industry, predominantly developed after World War II, employs more workers than any other industry, with 24 percent of the working population. The main manufacturing sectors are food processing, chemicals, electronics, and oil refining. While the country imports crude oil ($9.06 billion in 1983), it exports $5.2 billion of upgraded oil products. Commerce, transportation, and finance together absorb another third of the work force.

Dutch incomes are for the most part equally distributed, highly taxed, and at low overall levels when compared to those of the United States. During the late 1960s and early 1970s, wages rose faster than productivity. Now in order to maintain a competitive advantage in the world export market, moderating incomes has become one of the principal economic policy goals of the government. The mean gross annual income of the economically active population amounted to 45,600 guilders in 1981, when the guilder was worth 40 cents (at present, it hovers around 30 cents). The mean net income in the same year amounted to 31,800 guilders, indicating a 30 percent proportion withheld in taxes and social security contributions.

In 1983, 38 percent of the wages of an average manufacturing worker who is the sole earner in a family of two children were withheld, one of the highest rates in the world, together with Denmark and Sweden. In the United States, a similar worker only paid about 22 percent of his gross income in taxes and social security. Mean annual household incomes in 1981 amounted to 49,200 guilders gross and 35,800 net.

In exchange for such heavy taxation, the Dutch worker receives a large number of social security benefits, ranging from guaranteed retirement, disability, and unemployment benefits to free medical and dental care, and subsidies for such basic needs as housing and public transportation. With a per capita expenditure of 2,000 guilders in 1981, the Netherlands has the world's fourth most expensive public health-care system, after Sweden, Denmark, and Norway.

Incomes after taxes vary little. While the median net annual household income was 32,800 guilders, the income range of the middle 50 percent income category was from 24,050 to 44,700 guilders. Much of the difference can be attributed to the gradual rise of income with age. In part, this relative equality is due to the progressive tax system and a guaranteed minimum income policy. The legal gross minimum wage for any person over age 23 was fixed at 2,048.80 guilders per month in 1983. For heads of households with dependents, the welfare system maintains this income in the event of unemployment. Unemployment benefits for one-person households are lower.

*"A PEOPLE OF MODEST TASTES AND FRUGAL HABITS, THE DUTCH TEND TO VALUE COLLECTIVE OVER PRIVATE CONSUMPTION."*

Now that the number of unemployed has grown to 800,000, keeping up with the demands of such a costly welfare system deeply troubles the Dutch government.

### CONSUMPTION

A people of modest tastes and frugal habits, the Dutch tend to value collective over private consumption. They have been slow to adopt the stepped-up lifestyle of postwar economic success so wholly welcomed by their eastern neighbors, the Germans. While the Netherlands scores high on an indicator such as the number of telephones per 100 inhabitants (54 in 1982, the fourth highest among the major European countries), it trails behind countries like France or West Germany in terms of home or car ownership, or television sets per 100 inhabitants (0.31 in 1983). Bicycles outnumber cars. Each of the 4.2 million private cars covers an average 8,950 miles per year. Other consumer durables are more common; 98 percent of all households possess a refrigerator, 89 percent a washing machine (1983), and 80 percent a record player.

The Dutch eat lightly. Daily per capita calorie and meat consumption (in 1980, 3,338 calories and 185 grams) falls below that of the United States (3,652 and 304), Belgium (3,583 and 242), West Germany (3,537 and 220), and France (3,390 and 241), indicating a preference for vegetables and other light foods. According to a 1981 survey, the average Dutch household spent 20.8 percent of its budget on food, 18.5 percent on clothing, and 11.3 percent on transportation. Spending patterns of the different income groups varied only minimally.

Radio and television advertising, around only since 1967, seems timid by U.S. standards, being limited to five-minute intervals before and after the news. No cigarette commercials can be aired either on radio or television. Surprisingly, despite such restrictions, the Netherlands had the world's third highest per capita expenditure on advertising in 1980 ($187), following the U.S. ($241) and Switzerland ($202).

### TRANSPORT AND COMMUNICATIONS

Its favorable location at the North Sea coast and in the middle of the Rhine delta make the Netherlands the "Gateway to Europe," and particularly to the industrial complex of the German Rhine-Ruhr area and Northeastern France. The Netherlands has by far the world's longest stretch of inland waterways per square mile of national territory. Dutch shipping companies account for about half of the cargo transport by water within the EEC. More than one-third of all U.S. imports pass through the port complex at Rotterdam, the largest of its kind in the world.

Although the quantity of independent printed media in the Netherlands is fairly large, advertising competition from radio and television has reduced their number in recent years. At present, 24 enterprises distribute a total of 84 daily newspapers, with a circulation of 4.7 million. Further competition comes from a variety of local newspapers and special advertising papers. Apart from newspapers, the Dutch publish about 4,000 journals and magazines.

### SOURCES OF INFORMATION

Although no complete census has been published in recent years, statistical information on the Netherlands, both in Dutch and English, is abundant and easily obtained. The Central Bureau for statistics (CBS), located at 428 Prinses Beatrixlaan, POB 959, 2270 AZ Voorburg, telex 32692 CBS NI, publishes many statistical digests, some of which are in English. The most important is the *Statistical Yearbook of the Netherlands* (available for 67.50 guilders from the Staatsuitgeverij, Chr. Plantijnstraat, POB 20014, 2500 AE The Hague), of which a condensed pocket version in Dutch also exists. The *Jaarstatistiek van de Bevolking (Annual Population Statistics)* contains bilingual tables and summaries in English.

The Netherlands Inter-University Demographic Institute (NIDI), located at the same address as the CBS, regularly produces analyses of Dutch population trends. It publishes the monograph series *Population and Family in the Low Countries* in English, jointly with the Belgian CBGS.

The European Community Information Service, 2100 M Street NW, Suite 707, Washington, DC 20037 distributes *Basic Statistics of the Community*, which contains comparative statistics on the Netherlands and other European countries, especially economic data.

Business information can be obtained through the Netherlands' Chamber of Commerce for America, 1 Rockefeller Plaza, New York, NY 10020, phone (212) 265-6460. Among other things, it distributes the magazine *Netherlands American Trade*. Another relevant journal is *Holland Life: Business, Culture, and News Magazine of the Netherlands*, 255 Keizersgracht, 1016 EB Amsterdam. Radio Netherlands broadcasts in English from the Dutch Antilles. More specific market information is available from several sources. Summaries can be found in *World Sources of Market Information, Vol. 3: Europe*, by Euan Blauvelt and Jennifer Durlacher, published by Ballinger (1982) in collaboration with the Abcor Bank Group, or in *European Marketing Data and Statistics 1985*, published by Euromonitor Publications in London and distributed by the Gale Research Co. in Detroit. •

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# PUBLICATIONS

**Asia's New Industrial World: Will the East Win?** by Michael Smith, Jane McLoughlin, Peter Large, and Rod Chapman, 1985, New York: Methuen, 136 pp., $6.95. Order from Methuen, 29 West 35th Street, New York, NY 10001.

Written by four reporters for the British newspaper, *The Guardian*, this book examines the growth and future of industry in Japan, South Korea, Singapore, and Indonesia. Although short, this book is packed with economic information without ignoring the social implications of changes driven by industrial growth.

In South Korea, for example, Jane McLoughlin writes that "there are indications that after industrialization will follow the moral and philosophical trends we have seen in America and Europe. Already, first sons, who traditionally take on the burden of the parents, are finding it harder than their younger brothers to find wives. Also, the still-small voice of women demanding equality and committing themselves to a career, rather than simply working in a factory until they marry and have children, may play some part in changing the old order."

While the reporters were sent to these Asian countries in part to assess the impact the countries will have in the 21st century, by the brief concluding chapter they agree that they cannot do more than pose a series of questions about the distant future. Events are moving so quickly, they say, that it is a real question whether the region will be an economic power center by 2001 or whether it will have achieved and passed its peak by then.

The authors do, however, find some common themes in the four nations:

—An emphasis on higher education.

—National planning based on consensus.

—The ability to manage constant change.

—A fierce national pride.

This book is highly recommended to anyone who is interested in Asian markets or involved in long-term planning for the markets in that region.

**European Marketing Data and Statistics, 1985** Twenty-first edition. London: Euromonitor Publications, Ltd., 360 pp., $160. Order from Gale Research Co., Detroit, MI 48226.

This volume differs from its sister publication, *International Marketing Data and Statistics*, because it includes Pan-European profiles of the 30 countries covered. Each profile furnishes a map of the country broken into major marketing regions, a list of the largest towns, total population, languages, religions, president or head of state, prime minister or equivalent, and ruling party. Population data are also given for each marketing region and the important towns.

It is also useful to look at these volumes in series. For example, according to the 21st edition, the percentage of households in Austria with a refrigerator actually decreased between 1981 and 1983 from 93 percent of households in 1981 to 88 percent of households in 1983, while the percentage owning a dishwasher went up slightly — from 13 percent in 1981 to 15 percent in 1983. By looking at the prior edition, you could also learn that the consumption per capita of potatoes, honey, beef, pork, and poultry went down, but the consumption of fresh vegetables went up significantly, much as it has in the United States. •

## COMING UP

**Tunisia:** The current government emphasizes education and encourages workers to seek jobs abroad.

**Some developing countries** look increasingly to the United States for higher education.

# 1985 CUMULATIVE INDEX

*Indexes all articles and major book reviews (*) appearing this year. When searching under region or continent, the user should also consult individual country entries. "International" has been assumed for main subject headings unless otherwise qualified.*

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*compiled by Robert Kibbee*

## FEATURE

# INFERTILITY IN DEVELOPING COUNTRIES

While attention is focused on how to decrease fertility among women in most developing countries, up to 40 percent of couples in some African countries are infertile.

The full extent of the problem is difficult to estimate because there is a stigma attached to infertility in many cultures, and couples are less likely to admit to this than to other medical conditions.

Infertility as a medical problem has evoked more sympathy than action. It is not a disease so its victims take up few hospital beds. Nor do they take days off from work so lost productivity is not a concern. The emphasis so far is more on preventing fertility than promoting it. Yet at the personal level, infertility does result in considerable suffering. And many couples are denied children when simple methods of public health could have helped prevent their condition.

In modernized countries, infertility is more visible because people expect to be able to plan and control their lives so they are more likely to look for a cause of the problem and seek help. Prospective parents also worry because the traditional solution of adopting a child is now more difficult to arrange.

The causes of fertility differ somewhat in rich and poor countries. Infertility in modern countries is caused primarily by hormonal disorders or by the misplaced growth of womb tissue on vital reproductive organs. Both are relatively easy to treat with drugs.

Far more common in developing countries, and far more difficult to treat, is infertility as the aftermath of infections, including sexually transmitted infections that can lead to tubal blockage and inflammation. These disrupt the transport of sperm and eggs, making fertilization impossible. Clinic reports from Nairobi, Kenya show that nearly three-quarters of women who are treated for infertility have tubal disorders and in Papua New Guinea the figure is as high as 86 percent.

The situation is compounded among men by their reluctance to admit to the problem. Clinic studies in Uganda and Nigeria show that men may have symptoms for more than two years before even seeking treatment for blocked tubes. The longer the condition goes untreated, the more difficult it is to reverse the effects.

On the basis of studies by the World Health Organization and the United Nations Fund for Population Activities, the most common culprit worldwide is almost certainly gonorrhea, and it is probably to blame for the high incidence in Africa where it may have become established at the time of the slave trade. In one Nairobi family planning clinic, nearly one in five women were found to have gonorrhea and in Cameroon, it affected 12 to 15 percent of women in maternity and child health centers.

Sexually transmitted diseases may be thought to have reached alarming levels in modern countries, but rates in the Third World can be greater because less treatment is available. In Sweden, for example, intensive control efforts have brought the gonorrhea rate down to fewer than 3 per 1,000, but similar improvements in developing regions have been difficult to achieve.

Apart from infections, the most important cause of infertility may be childbirth itself, together with illegal abortion — especially when carried out in unhygienic conditions and when women with complications cannot reach a hospital.

The prospects for treating the more serious cases of infertility are fairly bleak. The "high-tech" approaches such as in vitro fertilization and artificial insemination have received much publicity. But such techniques are too time-consuming, laborious, expensive, and uncertain for most couples to contemplate, even in developed countries. For couples in poor countries they are simply out of reach. Alternative approaches — hormonal treatments, for example — are likely to make advances over the next decade, but they do not at present boast much improvement over nature: a seven-year study of infertile couples in Canada showed that while 41 percent of patients receiving treatment did achieve pregnancy, so did 35 percent of those who were not treated.

Most couples depend on time-honored solutions such as finding someone else to bear a child for them. Surrogacy may have achieved some comparatively recent notoriety. Yet ever since Abraham's barren wife Sarah sent her husband to Hagar the handmaiden to bear them a child, women have for reasons of compassion or profit carried children on others' behalf. And adoption is still common in countries where a large number of women die in childbirth.

Prevention of infertility is likely to be more effective than a cure. Some forms cannot be prevented, but public-health programs can do much to eradicate sexually transmitted diseases. And improving obstetric care and stamping out illegal and aseptic abortion would help prevent some of the problems that occur in childbirth. •

—*Kay Wellings*

*United Nations Fund for Population Activities*

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# INTERNATIONAL DEMOGRAPHICS

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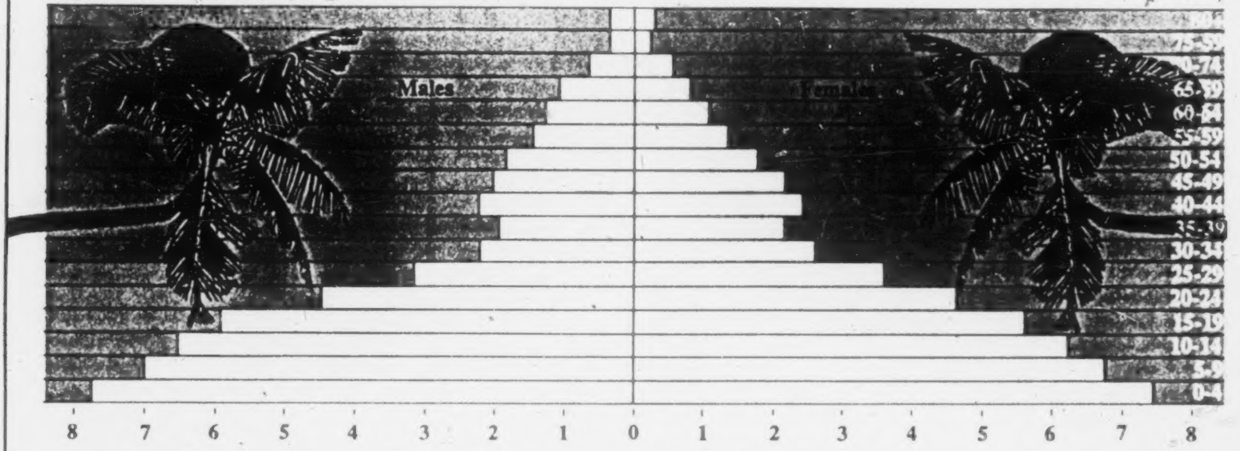
JANUARY 1986

VOLUME 5, NUMBER 1

Population of Tunisia by Age and Sex: 1982

(in percent)



## COUNTRY PROFILE

# Republic of Tunisia

Fantastic mirages shimmer over the crystallized flats of Chott el Djerid. Lush, green oases sparsely dot the remaining barren land of the Sahara.

The desert makes up about half of Tunisia's 632,387 square miles. Slightly larger than the state of Georgia, Tunisia is located on the northernmost point of the African continent only 85 miles across the Mediterranean Sea from Sicily, bordered by Libya on the east and Algeria on the west. In addition to the Sahara, there are two other topographical regions. The Tell of northern Tunisia, considered the most important area, contains rich farmlands as well as the only river with water year round. The Steppe, a rock transitional zone, lies between the Tell and the Sahara.

After 75 years of French protectionism, Tunisia gained independence in 1956. In 1957, Tunisians voted to abolish the monarchy, created the Republic of Tunisia, and elected their first president. The 1959 constitution created three branches of government but granted the greatest power to the executive branch. It called for the election of the president to a five-year term with a maximum tenure of three successive terms. A subsequent amendment allowed the first president of the republic, Habib Bourguiba, to be elected president-for-life in 1974.

The unicameral legislative body, called the National Assembly, currently consists of 136 members, or deputies, who individually represent the nation as a whole rather than one area or state as in the United States.

Until recently, the only legal political party was the Destourian (Constitutional) Socialist Party (PSD). However, three opposition parties have been granted permission to organize--the Communist Party, the Social Democratic Movement,

*continued*

## INSIDE

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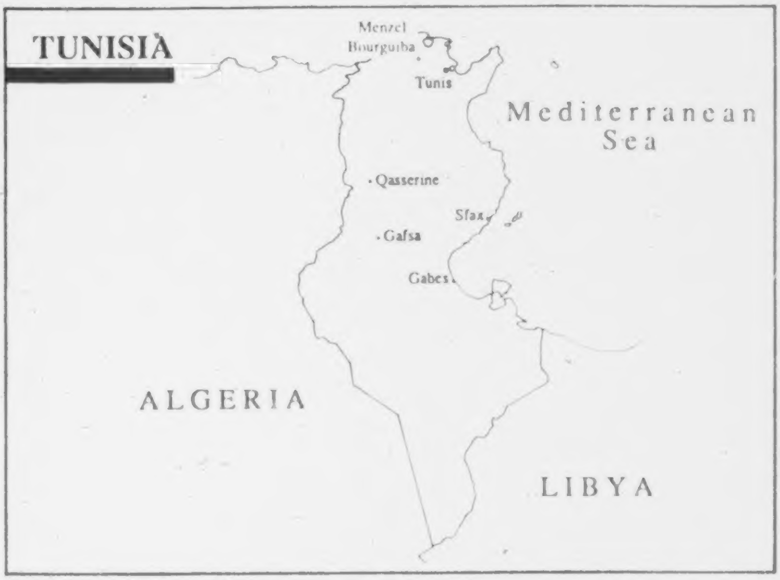
**THIS MONTH: TUNISIA**



and the Popular Unity Movement. Other opposition groups still await official permission to function.

### REGIONS AND CITIES

Tunisia's population is growing rapidly despite the government's family planning program and the availability of modern birth control. In the 15-year period following independence, Tunisians increased their number by 45 percent. The country's population was recorded at 5.6 million in 1975, 6.4 million in 1980, and an estimated 7.2 million in 1985. The population is projected to reach 8.1 million by 1990 with an annual growth rate of about 2.4 percent. Population density reached 114 people per square mile in 1985 compared to 1980's 101 people per square mile.

For administrative purposes, Tunisia was divided into 13 gouvernorats, or provinces, at the time of independence in 1956. As the number of inhabitants increased, internal boundaries were periodically revised and additional gouvernorats created in order to ease the administrative burden. There are currently 21 gouvernorats administered by appointed officials.

There is a definite shift of workers and their families towards densely populated urban areas as rural homes are abandoned in the search for jobs. Rural population decreased to 46 percent in 1985.

The northern quarter of the country includes the rich Khroumirie forest and much of the nation's arable land. Of the 56 percent of Tunisia suitable fof agriculture, about one-quarter is used for grazing and 14 percent supports forestland where cork trees flourish. The nation's main industries are also located in the north.

The dry Steppe and Sahara produce alfa grass of limited use for grazing but from which paper can be manufactured. In 1963, the government constructed a paper mill in Kasserine (Steppe region) which, for many years, provided paper for export as well as internal use.

Phosphates are one of Tunisia's most important mineral resources and largest exports. Factories located at Sfax and Gafsa process the mineral for fertilizers.

Fishing is productive along the extensive coastal regions where sardines, anchovies, mackerel, tuna, lobsters, oysters, and sponges are harvested.

Oil deposits, originally discovered south of Gabes in 1965, provide enough petroleum products to meet the needs of the country and for export. A steel mill was built in the late 1960s in Menzel Bourguiba which uses only iron ore mined in Tunisia.

Tourists visit Tunisia to enjoy the warm climate, beautiful beaches, and historic sites as well as the mirages of Chott el Djerid. Many Roman ruins remain and artifacts are preserved in local museums.

Tunis, a port city on the northern coast, is the largest metropolitan area as well as the capital of Tunisia. The population of Tunis, recorded at 186,000 in 1926, grew to 685,000 in 1966 and almost 874,000 in 1985. Likewise, the gouvernorat of Tunis is the largest in the country with a population of 1.8 million. The oldest area of Tunis is the suburb of Carthage which still retains the ruins of the ancient city.

### ETHNICITY AND RELIGION

Berbers were the original inhabitants of the land now called Tunisia. Although conquered and ruled by Phoenicians, Romans, Vandals, and Byzantines, Berber tribes maintained their culture and bloodline for centuries. The Christian influence was felt around 180 A.D. Arabs, arriving in the area for the first time in 647, brought Islam which quickly took root and flourished. Inter-

**INTERNATIONAL DEMOGRAPHICS**

**PUBLISHER:** *Doris Walsh* **EDITOR:** *Denise Rusoff* **ART DIRECTOR:** *Carol Terrizzi*

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marriage followed and a subsequent wave of Arab immigration brought about an internalization of the Arab language and culture. Today, 98 percent of the population is Arab-Berber. Less than 1 percent is considered pure Berber and only a few are believed to be pure Arab. Europeans who make up about 1 percent of the population, are the only Christians in an otherwise Muslim world.

Although the constitution says that "Tunisia shall be...Islamic in religion (and) Arabic in language," religious freedom is also guaranteed. Several Roman Catholic orders are active in the country by agreement between the Vatican and Tunisian government. Anglican as well as Greek and Russian Orthodox churches are also represented. Attempts to convert citizens to religions other than Islam are, however, discouraged.

The Jewish community, once estimated at 200,000 or about 8 percent of the population, now makes up less than 1 percent of the population. Emigration is responsible for the declining number of Jews. Those who choose to remain worship freely and maintain their religious organization under the protection of the government.

There is no evidence of religious discrimination in the private sector although government employment is generally reserved for Muslims. Government officials also control appointments at more than 2,000 mosques throughout the country where loyalty to the ruling party is a prerequisite for employment.

French is the second lanugage of the government and is spoken by all educated Tunisians. Both Arabic and French are used as the medium of instruction at schools, and French is the predominant language at the university level.

## AGE DISTRIBUTION

Tunisia's age-sex distribution is typical of developing countries. One departure, however, is a smaller percentage of people in the 35-to-39 age group than would normally be expected. Tunisia experienced a flu epidemic in the early 1940s causing an extremely high infant mortality rate. The higher number of deaths is reflected in the applicable age group from the 1946 census to today.

Tunisia has one of the first, and most successful, family planning programs in the Arab world. The government program, combined with the countrywide campaign to educate the masses and increasing numbers of women in the labor market, succeeded in lowering the country's birthrate. Recorded at 35.2 per 1,000 in 1980, the birthrate fell to 32.9 per 1,000 by 1982 and is currently estimated to be lower still. The proportion of the population in the 0-to-4 age group was 18.5 percent in 1966, 16 percent in 1975, 15.5 percent in 1980, and 15.2 percent in 1982. Both trends are expected to continue.

The positive effects of the declining birthrate are offset somewhat by the government's health-care and nutrition programs which are lengthening lifespans and decreasing the overall mortality rate. The success of the two programs is reflected in the median age of the population and in the proportion of the population in older age groups. The median age has increased from 16.8 years in 1966 to 19.5 years in 1985, and the proportion of the population aged 60 and over has grown from 5.1 percent in 1956 to 6.7 percent in 1980.

The effectiveness of health and nutrition programs is also reflected dramatically in two sets of data. The stillborn rate was 13.8 per 1,000 live births in 1979 but decreased to 10.9 per 1,000 in 1982. The overall death rate also fell from 8.1 to 7.3 per 1,000 over the same period.

## HOUSING

Tunisian dwellings vary greatly in size and construction materials. Most of the homes are built of paving stones (cement or brick) and tiles. However, in rural areas nomadic tribes live in tents that can be easily dismantled and moved.

In the desert areas of the south, some Berber villagers subsist in underground homes. Rooms are dug horizontally into the walls of large pits. Shelves, benches, and beds are carved out of the rock, eliminating the need for conventional furniture. This unique form of housing is eminently suitable for desert dwelling because the pits remain cool during the 115-degree days and warm in the 40-degree nights.

**Tunisia Population Distribution by Age Group and Sex: 1982**

| *Age Group* | *Total* | *Male* | *Female* |
|---|---|---|---|
| All ages | 6,726,100 | 3,377,800 | 3,348,300 |
| 0-4 | 1,021,700 | 519,900 | 501,800 |
| 5-9 | 925,500 | 470,800 | 454,700 |
| 10-14 | 862,300 | 441,200 | 421,100 |
| 15-19 | 774,900 | 398,200 | 376,700 |
| 20-24 | 612,700 | 298,600 | 314,100 |
| 25-29 | 457,400 | 211,900 | 245,500 |
| 30-34 | 322,200 | 148,700 | 173,500 |
| 35-39 | 275,100 | 131,200 | 143,900 |
| 40-44 | 312,100 | 150,000 | 162,100 |
| 45-49 | 279,100 | 135,200 | 143,900 |
| 50-54 | 244,200 | 123,100 | 121,100 |
| 55-59 | 189,700 | 98,200 | 91,500 |
| 60-64 | 156,700 | 85,400 | 71,300 |
| 65-69 | 127,200 | 72,700 | 54,500 |
| 70-74 | 82,000 | 45,700 | 36,300 |
| 75-79 | 39,000 | 23,500 | 15,500 |
| 80+ | 44,300 | 23,500 | 20,800 |

*Source: Insitut National de la Statistique, Annuaire Statistique de la Tunisie, Vol. 27, Nouvelle Serie, 1982*

**Cities With Populations Over 100,000:**

| | |
|---|---|
| Tunis | 873,515 |
| Sfax | 256,739 |
| Bizerte | 109,879 |
| Sousse | 102,097 |

*Source: Polk's World Bank Directory, International Edition Mid-Year 1985 Issue*

A few slums, called *bidonvilles*, exist on the outskirts of large urban areas. The *bidonvilles* take their name from shacks made of mud and covered with *bidons*--gasoline barrels flattened to form metal sheets. In a government attempt to eliminate substandard housing, many needy families are given loans or grants, or are provided with free construction materials. Housing co-ops are encouraged, and government housing projects are underway.

The greatest volume of housing is found in the gouvernorats of Tunis, which has 181,000 dwellings for its 204,700 families, and Sfax with 108,300 housing units for 98,900 families. There were 1.1 million dwellings counted in the 1980 census.

Increasingly, Tunisians are building larger homes. In 1975, 45 percent of all housing had only one room; 28 percent, two rooms; and 26 percent, three or more rooms. By 1980, only 35 percent were one-room dwellings, 35 percent had two rooms, and 30 percent had three or more rooms. Most Tunisians own their own houses or apartments.

Running water is available in 72 percent of all urban homes, but in only 7 percent of rural homes. In many areas, drinking water is obtained from public fountains or wells. Adequate sewer systems are not as readily available. Only 52 percent of urban dwellings and 2.1 percent of rural dwellings have modern waste disposal equipment.

In the cities, 85 percent of all homes are wired for electricity. In rural areas, petrol lamps are commonly used, and only 18 percent of all rural housing has electricity.

### HOUSEHOLDS AND FAMILIES

Tunisian families tend to be smaller than those of many developing countries. According to the 1980 census, the average family size was 5.6 persons. The smallest average family size was recorded in the gouvernorat of Tunis at 5.4 persons per family, the largest in the gouvernorats of Zaghouan and Sidi Boouzid at 6 persons per family.

Statistics also show comparisons between the rural and urban areas of each gouvernorat. In 1980, 1.1 million families lived in Tunisia. Of these, 611,000 lived in urban areas. Not surprisingly, families in rural areas were larger than those in urban areas--5.7 people per family in rural areas, and 5.4 persons per family in urban areas.

Marriages are declining both in actual numbers and as a percentage of the population. The 52,939 marriages performed in 1979 represented a rate of 17 per 1,000. In 1982, an estimated 50,177 marriages occurred, a rate of just under 15 per 1,000. Polygamy, once common among the Arab population, is now prohibited by law.

Getting divorced was once easy for men in Tunisia. An Arab husband needed only to send his wife to the home of her father in order to end the marriage. President Bourguiba outlawed this traditional form of divorce and brought marriage under the protection of the courts. Statistics indicate that modern divorce is on the decline. In 1979, 7,124 divorces were granted compared with 6,047 in 1982.

### LITERACY AND EDUCATION

Prior to 1881, Tunisia's only educational institutions were small, Moslem schools that taught Islamic subjects exclusively. The arrival of the French brought a better form of education. Two school systems were created--one for French children modeled after schools in the homeland and one for Arab children with a similar curriculum--but they served only a handful of students.

When independence was declared in 1956, only 15 percent of the population was literate. President Bourguiba launched a campaign to educate the people of Tunisia, consistently dedicating one-quarter to one-third of each annual budget to improving the educational system, particularly the number and quality of primary schools. The government also assumed control of the 200 Islamic schools, ending the distinction between religious and public schools.

The primary level of education includes grades 1 through 6. Lower secondary is equivalent to our junior high school and upper secondary to high school. To progress from one level to another, students must pass national examinations. Although education is compulsory for eight years, only 85 to 90 percent of primary school-aged children are actually enrolled.

The government also maintains adult education classes where reading, writing, mathematics, civics, and agriculture are among the subjects taught. Efforts to improve education have been successful. The literacy rate, defined as those people aged 10 or older who can read and write, was 15 percent in 1956, 32 percent in 1966, 45 percent in 1975, and 53 percent in 1980. Although many one- and two-room schools have been established in sparsely populated areas, rural literacy, still at 38 percent in 1980, lags behind the urban literacy rate of 65 percent.

The University of Tunis was founded in 1959 and moved to the suburbs in 1971 where up-to-date facilities for scientific research were added. Unfortunately, in a country that desperately needs workers with technical skills, most students choose to study law, literature, or language. University students must pass rigid examinations each year in order to remain enrolled. Grants and scholarships are available to qualified students.

In addition to government-operated schools, private Catholic and Jewish schools are available through the high school level.

### LABOR FORCE

Unemployment is a problem in Tunisia, partly because of the age structure. More than 60,000 new workers enter the labor force each year while only 40,000 new jobs are created annually. The government officially recorded the growing unemployment rate at 12.9 percent in 1983, although a more realistic figure for the year is estimated at 18 percent for men aged 15 to 59. The rate is close to 25 percent with the inclusion of women and the under-employed. Unemployment for 1985 was expected to reach 30 percent.

To help alleviate growing unemployment, Tunisians are encouraged to look abroad for jobs whenever possible. An estimated 7,000 laborers found work in Europe in 1984.

More and more women are entering the labor market. Women were only 11 percent of the work force in 1975. In 1984, they held 20 percent of the available jobs. However, over 80 percent of employed women are in the lower third wage earning bracket.

Relatively few Tunisians are trained in professional and technical fields. Both doctors and nurses are in short supply, and of those practicing in Tunisia, many were imported from Europe. The government strongly urges students to enroll in technical courses and guarantees jobs to those who successfully complete training.

All unions are technically free of government restrictions and strikes are legally permitted. However, some workers have been required to remain at work during labor strikes, and some strikers have been arrested at strike sites although all were released within 24 hours. In September 1984, a decree was issued prohibiting union meetings in the workplace. The Tunisian General Trade Union Federation (UGTT) is the oldest and largest labor union with a membership of 700,000 workers.

Most Tunisians work in agriculture although an increasingly smaller proportion of the work force is required to farm the arable land. In 1960, agricultural production required the labors of over 50 percent of the work force compared with 35 percent in 1980. Industry consumed 19 percent of the work effort, service industries, 17 percent; and construction, 10 percent.

## TIPS ON TRENDS

### Canadian Trends and Health

If present population trends continue, Canada will be a prime market for home health care and nursing homes for the elderly. Three new reports from Statistics Canada can help with an assessment of Canada as a long-term market for health care and other consumer goods and services.

Following current trends, Canada will have a zero population growth rate by the year 2000, according to new projections released by Statistics Canada. At the same time, its population aged 65 and over will grow rapidly, topping 4 million by 2000.

As Canada's elderly population grows, its younger population will diminish dramatically. By the year 2000, there will be 5.9 million people age 17 and under. Based on all projections, the labor force (aged 18 to 64) would go from its current 16 million to 19 million by 2000.

The current fertility rate in Canada is about 1.7 children per woman. If the fertility rate declines to 1.4 children per woman and net immigration is 50,000 a year, Canada's population could reach 28 million by the year 2000. If the fertility rate increases to 2.2 children per woman and net immigration reaches 100,000 a year, the population would reach 30 million people by the year 2000.

Order *Population Projections for Canada, Provinces and Territories, 1984-2006* (No. 91-520) for $50 from the address below.

The results of a Canadian Health and Disability Survey conducted in 1983 and 1984 are also now available. The report describes the non-institutionalized population, aged 15 and over. Data are ready for special tabulations on a range of subjects including the nature and prevalence of disability, demographic and household characteristics, employment, education, transportation, accommodation and certain economic characteristics such as individual income.

A selection of the data is also available in *Highlights from the Canadian Health and Disability Survey, 1983-84* (No. 82-563) for $10. This bulletin, available from the address below, contains 21 tables covering a variety of topics including prevalence, nature and degree of disability as well as numerous socio-economic characteristics. For special tabulations contact Frank Grabowiecki, Manager, Disability Database Development Project in the Health Division at (613) 990-8780.

*Canadian Youth: Perspectives on Their Health* compiles results of the Canadian Health Survey. An analysis of the statistics by age group and sex yields interesting comparisons. Young men and women in the 15 to 19 groups seem to have similar lifestyles with regard to drinking, smoking, drug use, medical consultations, disability days, bed-days, and the use of violent methods of suicide whereas there are sharp contrasts between the behavior patterns of older men and women. The cost of this study is $16.00.

Order each of the above from Publication Sales and Services, Room 1710, Main Building, Statistics Canada, Ottawa K1A OT6.

### WOMEN

For many years women in Tunisia were considered second-class citizens. Islamic law and social custom required women to be heavily veiled

**Distribution of Labor Force in Tunisia**

| | *1975* | *1980* |
|---|---|---|
| Agriculture | 37.2% | 35.0% |
| Industry | 16.9 | 19.0 |
| Mines, energy | 2.8 | 3.0 |
| Construction | 9.4 | 10.0 |
| Transportation | 4.1 | 4.4 |
| Commerce | 6.9 | 7.6 |
| Services | 17.8 | 17.2 |
| Other | 4.9 | 3.8 |

*Source: Institut National de la Statistique*

and clothed from head to foot. Women worked only on the family farm or inside the home. They had no civil rights, no education, and no control over their lives. Their husbands were permitted to divorce them at will and to maintain as many as four wives.

Today women are full citizens with the same legal rights and responsibilities as men. They have the right to vote, run for office, and control their own financial affairs. Encouraged to attend school, women make up 40 percent of the primary and secondary school enrollment. They are permitted to hold jobs outside the home, and although they are confined to primarily low-income positions, they account for 20 percent of the country's work force.

Women now have the protection of the courts in matters of divorce and child custody, which is guaranteed by legislation. Arab men are no longer permitted more than one wife.

Traditional attitudes, not legal barriers, limit women's participation in politics. However, a small number of women are active in the government. There are two female ministers in the 24-member cabinet, and at least five judges are women. In the 136-member National Assembly, seven women deputies hold seats.

Traditional attitudes also restrict the role of women in society despite the efforts and support of the government. Many women, especially in rural areas, are unable to claim their full legal rights.

### THE ECONOMY

One of Tunisia's greatest economic problems is a foundering agricultural sector. Much of the food consumed by Tunisians must be imported which contributes to the growing negative trade balance. Agricultural problems stem from adverse weather conditions and the nature of the industry. As more than half the farms are fewer than 50 acres, modern farming methods are generally not applicable.

In 1983, olive oil production fell by 31 percent, grain by 28 percent, and citrus by nearly 17 percent. Increased production of fruit, vegetables, and livestock offset other crop failures to produce minor growth of 0.2 percent.

The tourist industry has also suffered decline in recent years. A general slump in European tourism affected the Mediterranean as a whole. Bread riots last year, when the government briefly eliminated grain subsidies, caused concern among some tourists who chose to avoid Tunisia rather than chance riots. The recent sanctuary granted to Yasir Arafat and the Palestine Liberation Organization is expected to adversely affect future non-Arab tourist trade.

Tourism, one of Tunisia's few sources of hard currency, has already declined by 8 percent in real terms. Although government officials predict a 6 percent growth, economists forecast continued decline or at best, no growth.

Skyrocketing wages contributed to rising consumer prices and inflation. After two years of annual wage hikes of 30 percent, annual wages were held to a 10 percent increase in 1983. Early in 1984, the government instituted a general wage freeze.

France is Tunisia's largest supplier with 22 percent of the import market. Italy follows with 11 percent. West Germany supplies 10 percent of goods and the United States 8 percent. U. S. exports to Tunisia in 1983 included cereals, soybean oil, cigarettes, used clothing, paper products, automotive equipment and parts, pharmaceuticals and scientific equipment. In addition to these, the Department of Commerce has identified realistic markets as equipment for agriculture and irrigation, building construction, data processing, mining, and telecommunications.

### SOURCES OF INFORMATION

Statistical documents from Tunisia are printed in French. The most recent census was in 1980. Reports from that census are available from Institut National de la Statistique (L.I.N.S.), 27 rue de Liban, Tunis, 3 D 500, Tunisia. Requests to this office from *International Demographics* have received timely responses. Besides census volumes, the same office also publishes a statistical yearbook, *Annuaire Statistique de la Tunisie*.

Business investment information can be provided by two Tunisian organizations. They are Agence de

## TIPS ON TRADE

### Advertising in Ecuador

Cinema is an important advertising medium in Ecuador, especially for consumer goods, according to a newly-updated bulletin from the U.S. Department of Commerce.

Most movie theaters show 15 minutes of advertisements before each feature. There are 235 movie theaters in the country with a total capacity of about 155,000 people.

# INSIDE INFORMATION

## Mid-Decade Censuses

Several countries have announced mid-decade censuses or surveys.

In Japan, a census was held Oct. 1, 1985. First results should be available now with 1 percent sample results available in May, 1986.

In Australia, a census will be held June 30, 1986. First results are expected to be available in March or April 1987.

In Hong Kong, a By-Census for small area data collection is scheduled for sometime in 1986. No date has been announced.

In South Korea, a mid-decade census was held Nov. 1, 1985. The preliminary count should be available by January 30, with the 2 percent sample count scheduled for release in July 1986. Final reports are due by December 1987.

In New Zealand, the mid-decade census is scheduled for March 4, 1986. Provisional results are expected as early as June 1986 with final regional bulletins available in July 1987.

Sri Lanka has announced a mid-decade census for 1986, with no date scheduled. Bangladesh expects to carry out its mid-decade census in March 1986. Indonesia has held an Intercensal Population Survey with provisional results expected early this year.

In Canada, a 1986 Census of Agriculture will be held on June 3, 1986. For the first time farmers will be asked about the use of such technological developments as office computers and subsurface draining systems as well as the usual questions about crops, livestock, and farm machinery.

Turkey held a census on October 20. First results are expected in mid-1986.

## Children's Markets in Japan

While the population of young children, aged 0 to 14, in Japan steadily decreases, the market for children's goods expands as Japan's baby boomers buy for their kids.

The population of young children numbered roughly 26.3 million as of March 1985, a decrease of nearly half a million from the previous year. This rate of decrease is expected to continue according to a report from (JETRO) the Japan External Trade Organization. By the year 2000, the 0-to-14 age group will number an estimated 22.5 million.

A survey taken in 1982 found that sales in the food sector of such items as candies, drinks, dairy products, and instant food -- totalling a whopping $25.5 billion -- clearly dominated the $40 billion children's market. A distant second at $2.8 billion was sales of stationery and related items followed closely by sales of education-oriented goods ($2.4 billion), books and other publications ($2.4 billion), and sporting and leisure goods ($2 billion).

Sales of sundries and children's apparel followed at $1.6 billion each. Expenditures on entertainment at $400 million and furniture at $400 million brought up the rear. All others totalled $1.2 million.

The results of this survey come as no surprise. Japan has a long history of such buying patterns among children. Traditionally, young children on their way to and from school would stop in at Mom-and-Pop-style corner stores called *dagashiya* to buy inexpensive treats, toys, and stationery items. *Dagashiya* were conveniently located near stations as Japanese youth travel to school on public buses and trains.

Once a dying breed due to the introduction of supermarkets in small neighborhoods, *dagashiya* recently resurfaced all over Japan as the result of a tremendously successful franchise operation.

Senior citizens often own *dagashiya* and not only pride themselves on giving suggestions to children on what to buy but also on how much to spend each day depending on their weekly allowances.

Although Japanese youth still spend their money in nickels and dimes, they are setting their sights on higher-priced items. Thirty-eight percent of elementary-school-aged boys said they wanted personal computers; 26 percent, TV games; and 11 percent, better bicycles.

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Promotion des Investissements (API), 7 rue de l'Arabie Seoudite, Tunis, Tunisia; telex 1166; telephone 280-674; and Agence de Promotion des Investissements Agricoles (APIA), 10 rue Ibn Jazzar, Tunis, Tunisia; telex 12280; telephone 288-400.

The U. S. Department of Commerce offers several useful publications. *Marketing in Tunisia* (OBR 81-01) and *Foreign Economic Trends* (FET 85-17) provide detailed economic and foreign trade information.

*Background Notes-Tunisia* and *Tunisia Post Report* are provided by the U. S. State Department. The Bureau of International Labor Affairs publishes *Country Labor Profile-Tunisia*.

Obtain the above from the Superintendent of Documents, U. S. Government Printing Office, Washington, DC 20402, telephone (202) 738-3238.

The U. S. Department of Commerce maintains a staff of trade specialists who can assist U. S. companies. Contact Department of Commerce, Office of the Near East (ONE), Washington, DC 20230, telephone (202) 377-5737. •

*--Linda Newcomb*

*Linda Newcomb is a freelance writer who has lived and worked overseas.*

FEATURE

# Foreign Students Help Fill Classrooms

Admissions offices of universities in the United States look increasingly abroad to fill their classrooms. While the number of college-age people in the United States is gradually declining, this age group is growing rapidly in most developing countries.

Moreover, the developing countries have a crying need for trained teachers, engineers, health practitioners, accountants, scientists, and other skilled professionals who can help their countries develop economically. But, they cannot build and staff colleges and universities fast enough to educate these professionals themselves.

Over 50 percent of doctoral degrees awarded by U. S. universities in engineering go to foreign students on temporary or permanent visas, according to a report from the Scientific Manpower Commission, a participating organization of the American Association for the Advancement of Science.

At the doctoral level, 62 percent of the foreign nationals receiving degrees stayed to work in the United States, making up about 36 percent of new entrants to the work force, according to Michael Finn of Oak Ridge Associated Universities.

The latest edition of the *UNESCO Statistical Yearbook* (1984) provides detailed data on the numbers of students, by sex and field enrolled in school, on a country-by-country basis. Additional tables provide statistics on science and technology--by numbers of personnel of various types and by expenditures.

*The UNESCO Yearbook* shows that 45 selected countries sent 328,299 students to the United States in 1981. Fewer than 20,000 U. S. students studied abroad the same year.

**Countries Represented by 5,000 or More Students in U.S. Colleges and Universities**

| *Country* | *Estimated Numbers* |
|---|---|
| Iran | 28,701 |
| China | 19,903 |
| Nigeria | 15,651 |
| Canada | 11,967 |
| Japan | 11,223 |
| India | 9,004 |
| Saudi Arabia | 8,175 |
| Malaysia | 7,537 |
| Hong Kong | 7,194 |
| Mexico | 6,313 |
| Lebanon | 5,441 |
| Thailand | 5,388 |

*Source UNESCO Statistical Yearbook: 1984*

Of the students whose country of origin is specified, 44 percent are from East and West Asia. Only about 7 percent of the students come from Europe, whereas more than 70 percent of all U. S. students who are abroad are in school in a Western European nation. No country is specified for 20 percent of the students.

The Asian countries that send the most students to the United States are Iran, China, Japan, India, Jordan, South Korea, Lebanon, Malaysia, Saudi Arabia, and Thailand. Not surprisingly, except for Japan, a developed country, these nations verge on being classified as developed. In *International Demographics'* country cluster system (April 1984), most of these countries are referred to as "Climbers"--nations where industrialization is moving toward more sophistication, and education is seen as one of the most important means of moving into the middle class.

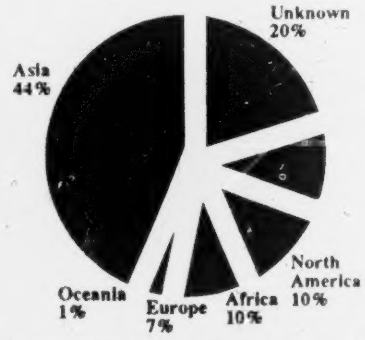
The chart shows the percentage of foreign students who come to the United States from each region. The table includes all countries that have 5,000 or more students in the United States at any one time.

The *UNESCO Yearbook* is available for $84 (including sales tax and handling) from Unipub, P.O. Box 1062, Ann Arbor, MI 48106.

*The International Flow of Scientific Talent: Data, Policies, Issues,* edited by Sue V. Barthel and Julie A. Early, is available for $15 from the Scientific Manpower Commission, 1500 Massachusetts Ave., NW, Suite 831, Washington, DC 20005. •

**Where Students Come From**

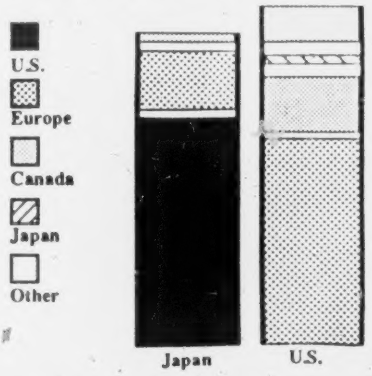
More than 325,000 foreign students come to the U. S. each year. This chart shows the regional origin of foreign students in the U. S.



*Source: UNESCO Statistical Yearbook: 1984*

**Educational Imbalance**

Percent of U.S. and Japanese Students Who Study Abroad by Destination. For every U.S. student who studies in Japan, 17 Japanese students come to the U.S.



*Source: UNESCO Statistical Yearbook: 1984*

# PUBLICATIONS

**Social Indicators for the European Community,** 1984, Luxembourg: Office of Official Publications of the European Community, 138 pp., $14. Order from European Community Information Service, 2100 M Street, NW, Suite 707, Washington, DC 20037.

If you need charts to help you understand social trends in the European Community, this is the place to turn. Topics range from total population projections to private consumption per inhabitant in each country. Time series provide trend information.

For example, you could find out that the number of doctors in Italy per 100,000 inhabitants has increased from 181 in 1970 to 358 in 1982 and, moreover, that Italy includes dentists in the total number of doctors so its numbers are not comparable to the other European Community countries.

Social indicators shown in charts and tables include employment and unemployment, trends in employment in manufacturing, the position of women in the community, and consumer price indices, among others.

**Consumer Europe,** 1985 Printout, London: Euromonitor, 1985, 420 pps., $335. Order from Gale Research Company, Book Tower, Detroit, MI 48226.

If you want to know what is happening to lawn mower sales in Denmark, or ice cream consumption in Switzerland, you will want a copy of *Consumer Europe*.

*Consumer Europe* is the printed report from a pan-European market information database maintained by Euromonitor. It includes data that are stored on an information retrieval system, but are not available presently online.

Each page presents market information on a subject such as demographics, economics, or consumer expenditure or information on a specific consumer product such as ice cream, sun preparations, room deodorizers, or cheese. There are 24 different product categories presented and a variety of products in each category. For example, the pages on dried foods include nine different products including dried potato products, packet soup, and cake, and pastry mixes, among others.

The information is presented in two tables. The first shows actual figures, generally either retail sales in value, sales in units, or volume consumption from 1980 to 1984. The second table is derived from the first, and shows national market shares, per capita calculations, and growth rates, country-by-country. Although the information is constantly revised and updated, it is printed out only once a year.

The 1985 printout includes data for 13 European countries--a total of 351 million people. Not included are the Eastern Bloc countries, Greece, Luxembourg, Ireland, and Portugal. The data are useful for market research, new product planning, strategic planning, consumer research, and many other purposes.

**In Another Dimension--A Guide For Women Who Live Overseas,** by Nancy J. Piet-Pelon and Barbara Hornby, 1985, Yarmouth, Maine: Intercultural Press, Inc., 1985, 164 pp., $9.50. Order from Intercultural Press, P. O. Box 768, Yarmouth, ME 04096.

With chapter headings such as "Making the Decision," "Women Who Work," and "Staying Healthy Overseas," this book may come in handy for researchers who are moving overseas on a long-term basis as well as those who are moving for a specific project but expect to be gone for several weeks or months. While geared primarily to a spouse accompanying an executive assigned overseas, the chapter on women who work includes a section on single women professionals as well as on working wives. This book is useful for women considering an overseas assignment as well as for human resources planners who work with women employees and families assigned overseas.

**Voluntary Sterilization: An International Fact Book,** by John A. Ross, Sawon Hong, and Douglas H. Huber, 1985, New York: Association of Voluntary Sterilization, 118 pp., free. Order from Association for Voluntary Sterilization, 122 East 42nd Street, New York, NY 10168.

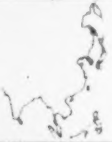
In 1980, 99 million people among couples of reproductive age worldwide were sterilized, according to this compendium of information about sterilization. This finding probably underestimates the current reliance on sterilization as a means of contraception since the number of sterilization users grows every year, according to the authors.

Because many factors impact sterilization trends, marketing researchers for both private and not-for-profit companies involved with reproductive health overseas need accurate, comprehensive information about who has been sterilized. For example, the level of education seems to have different effects on sterilization depending on the country involved. In South Korea and Thailand, sterilization is more prevalent among well-educated women, whereas in Bangladesh and Colombia sterilization is less favored among well-educated women.

Chapters focus on the country-by-country incidence and prevalence of sterilization, the laws and regulations currently in place, the way services are delivered, information about attitudes toward sterilization, procedures, and mortality. •

# REGIONS

## ASIA



### Malaysia

According to recently released estimates, the 1984 population of Peninsular Malaysia was 12.6 million people. The figures are included in *The 1984 Current Population Estimates on Peninsular Malaysia* released by that country's Department of Statistics.

The annual Malaysian population growth rate for 1980 through 1984 was 2.5 percent, slightly higher than the 2.2 percent annual rate recorded between 1970 and 1980.

Of the 12.6 million people, 7.1 million are Malays, 4.2 million Chinese, and 1.3 million Indians.

In 1984, 37 percent of the population was aged 15 or under, and only 6 percent of the population was aged 60 and over.

### Hong Kong

Sons are still more important than daughters among young people in Hong Kong.

A survey on family planning knowledge, attitudes, and practice conducted by the Family Planning Association of Hong Kong shows that couples with two daughters have a stronger desire for a third child than those with two sons. Preference for at least one son in the family is thought to be an important factor behind the difference between the "ideal" and "actual" number of children couples have, according to a report from Mrs. Eleanor Cheng, in the *Asian-Pacific Population Programme News*, published by the Population Division of the Economic and Social Commission for Asia and the Pacific (ESCAP).

The survey showed that the actual family size was 2.6 children per couple while the ideal was 2.4.

The findings were based on interviews conducted in 1982 with a random sample of 1,403 married women aged 15 to 49. They were asked to take account of their husbands' attitudes when giving answers.

Thirty-three percent of couples with two daughters and no sons said they wanted a third child and more than 90 percent of those said they wanted a boy. Only about 19 percent of couples with two sons wanted a third child.

The survey also found that Hong Kong has one of the highest practicing rates of contraception in the world--72 percent--and that use of contraceptives was favored by nearly 98 percent of the respondents.

However, the rate of practice among married recent Chinese immigrants was only 53 percent, much lower than for the whole population.

Findings confirmed that the small-family concept has generally been accepted. The ideal family size for couples had decreased from the 1967 average of 3.8 children to 2.4 children.

The actual number of children in each family has also decreased from 3.7 to 2.6, and this was reflected in the steady decline of birthrates, from 23 per 1,000 in 1967 to 16.5 per 1,000 in 1982.

### Japan

While married women in Hong Kong are reducing the number of children they believe to be ideal, young Japanese women are increasing their ideal family size to three children, according to another report in the *Asian-Pacific Population Programme News, and ESCAP publication.*

Japan's birthrate decreased to as low as 12.7 per 1,000 population in 1983 after the first baby boom when the birthrate was 34.3 in 1947, 33.5 in 1948, and 33.0 in 1949.

In recent surveys, the proportion of women who said they would not use contraception until "after two children are born," has increased, and the total fertility rate (the number of children an average woman bears) climbed to 1.8 in 1983, up .03 from 1982.

The preference for three children is growing mainly among young wives. However, recently women are becoming interested in careers and are marrying later than in past years. Taking into consideration all the factors that affect birthrates, it cannot be predicted whether the birthrate will increase in Japan's quickly-aging society soon, but it may be said that the decreasing birthrate has now stabilized.

### China

Americans working in the People's Republic of China for a U. S. multinational are typically assigned to Peking in a marketing position at the managerial level, according to the latest survey results from Runzheimer International.

These 35-to-39-year-old managers have an average base salary of

$52,700. They typically reside in hotels, eat all their meals in restaurants, and travel in taxis rather than in their own or rented cars. Most are there for two or three years. And between a quarter and a half are unaccompanied by family members.

A 32-page survey summary is available from Runzheimer International, Living Cost Division, Runzheimer Park, Rochester, WI 53105.

## *EUROPE*

### United Kingdom

The Office of Population Censuses and Surveys recently published its latest estimates of population for local government and health authority areas of England and Wales. The table shows the ten local government areas in England with the highest and lowest dependency ratios.

**The Ten Local Government Areas In England With The Highest And Lowest Dependency Ratios.**

| *Highest* | *Ratio* |
|---|---|
| Worthing | 99 |
| Rother | 95 |
| Tendring | 89 |
| Christchurch | 88 |
| Eastbourne | 87 |
| Arun | 87 |
| East Devon | 87 |
| West Somerset | 87 |
| Thanet | 82 |
| Torbay | 81 |
| *Lowest* | *Ratio* |
| Surrey Heath | 49 |
| Richmondshire | 48 |
| Wokingham | 47 |
| Ruchmoor | 46 |
| Camden | 45 |
| Oxford | 45 |
| City of Westminster | 44 |
| Kensington and Chelsea | 39 |
| Isles of Scilly | 27 |
| City of London | 20 |

*Source: Office of Population Censuses and Surveys, London, June 1985, Ref. PPI 85/*

The dependency ratio is the number of children aged 0 to 14 and people of pensionable age per 100 people of working age. In other words, the City of London has the fewest children and old people, and hence, the lowest dependency ratio in England.

A high dependency ratio means a need for schools, health care facilities, and care for the elderly. A low ratio usually means more affluent households because there are few retired people and two workers per household are common because there are no children.

### British Home Ownership

Britain has the largest percentage among large industrialized countries of young homeowners--people aged 25 and younger-- according to the country's Building Societies Association. The trade group in mid-August put the figure at 30 percent, saying that even though the young are reluctant to buy because of frequent, costly moves, a severe shortage of rental flats and homes leaves them little alternative except to buy.

*--Peter Inserra*

### Cyprus

While some countries try to discourage population growth, Cyprus is taking steps to encourage large families.

The population of Cyprus grew 1.3 percent between 1982 and 1983, to a total of 653,000 at the end of 1983. Most of the growth was from natural increase rather than from immigration.

By 1983, those aged 65 and over comprised nearly 11 percent of the population, compared with only 6 percent in 1960. The proportion of children aged 15 and under dropped from 36.4 percent in 1960 to 25 percent in 1983.

In order to obtain a better balance among its age groups, the Cyprus government encourages births. The total fertility rate which had declined to about 2 children per woman--just replacement level--during the 1970s and the time of the Turkish invasion in mid-1974, has now risen to 2.5 children per woman. The number of women who have three or more children is rising. By 1983, nearly 22 percent of all children born were at least the third child in their family.

During 1983, the government took the following steps to encourage births:

--Free medical care to all members of families with four or more children.

--Fare subsidy for public transport of the fifth and any higher order children attending secondary school.

--Reduced prices for government land for very large families.

--Priority of government housing schemes to large-sized families.

A complete profile with data from the 1980 census round in Cyprus appeared in the December 1984 issue of *International Demographics.*

## *NORTH AMERICA*

### Canada

Canada sets immigration levels each year, depending on its growth and its employment situation in the prior year. A recent report to the Canadian Parliament suggests a "moderate, controlled increase in immigration levels in coming years, subject to Canadian economic and labor market conditions."

Some statements from both non-government and provincial governments on the subject of immigration expressed the view that "immigration is a positive economic benefit to Canada, especially for the longer term,

**Canadian Births by Province: 1982-1983**

| *province* | *1983* | *1982* | *percent change* | *rate per 1,000 population 1983* |
|---|---|---|---|---|
| Canada | 373,689 | 373,082 | 0.2 | 15.0 |
| Newfoundland | 8,929 | 9,173 | -2.7 | 15.4 |
| Prince Edw. Is. | 1,917 | 1,924 | -0.9 | 15.4 |
| Nova Scotia | 12,401 | 12,325 | 0.6 | 14.4 |
| New Brunswick | 10,518 | 10,489 | 0.3 | 14.9 |
| Quebec | 88,154 | 90,800 | -2.9 | 13.5 |
| Ontario | 126,826 | 124,856 | 1.6 | 14.4 |
| Manitoba | 16,602 | 16,123 | 3.0 | 15.8 |
| Saskatchewan | 17,847 | 17,722 | 0.7 | 18.0 |
| Alberta | 45,555 | 45,036 | 1.2 | 19.4 |
| British Columbia | 42,919 | 42,747 | 0.4 | 15.2 |
| Yukon | 540 | 525 | 2.9 | 22.1 |
| Northwest | 1,491 | 1,362 | 9.5 | 28.9 |

*Source: Statistics Canada, Births and Deaths, Vital Statistics, Vol. 1 (Publication 84-204, 56-65)*

because immigrants augment the pool of capital, create jobs for Canadians by establishing or expanding businesses and industries, bring needed labor-market skills, and increase the demand for goods and services."

*The Annual Report to Parliament on Future Immigration Levels* sets an increase in immigration levels to 105,000 to 115,000 for 1986 and to 115,000 to 125,000 for 1987. These figures are up from the 85,000 to 90,000 announced for 1985.

The chart shows the trends in the origin of immigrants since the early 1970s. Three reports on Canadian immigration, *Annual Report to Parliament on Future Immigration Levels, The Revised Selection Criteria for Independent Immigrants,* and *Business Immigrants,* are available from Employment and Immigration Canada, Place du Portage, Phase IV, Ottawa-Hull K1AOJ9, Canada.

## Ontario

About one-third of all Canadians live in Ontario and more than two-thirds of the province's population live in metropolitan areas of 100,000 or more people. Over half of these live in the Toronto metropolitan area. Nine million people now call Ontario home.

Other interesting highlights from reports by Statistics Canada:

Since 1931, there has been an 11-year gain in life expectancy of men in Ontario and a 15-year gain for women. Men can now expect to live to age 72 and women to age 79.

There are now more senior citizens and fewer children are being born each year. Between 1931 and 1984, the proportion of those aged 65 and older rose from 7 to 11 percent, while the proportion of children fell from 28 to 21 percent.

Divorces in Ontario are on the rise. In 1931, there were 2,088 divorced persons. By 1984, the number had risen to 228,000--a 109-fold increase while the population of Ontario only doubled. •

## COMING UP

**Italy:** There is more to this country than pasta and Rome

**An Australian company** features mapping for site and customer location

**INTERNATIONAL DEMOGRAPHICS**
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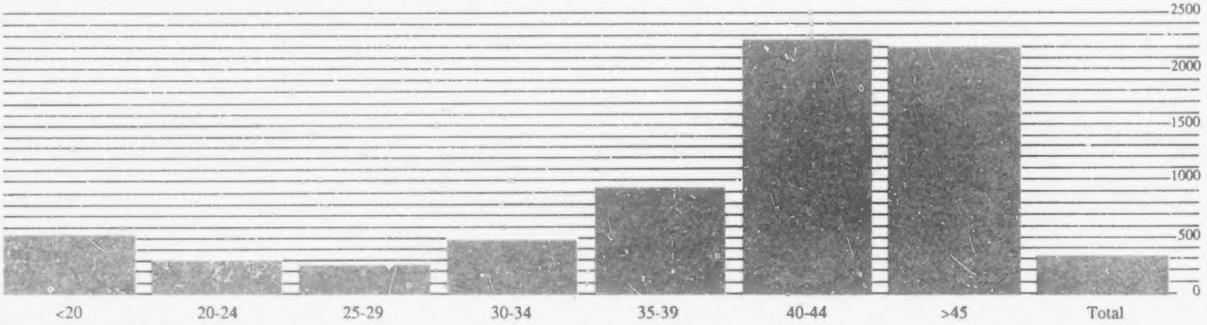
# INTERNATIONAL DEMOGRAPHICS

CONSUMER ■ TRENDS ■ AND ■ MARKETS ■ ABROAD

FEBRUARY 1986 VOLUME 5, NUMBER 2

## Legal Abortion in Italy: Ratio of Abortions to Every 1,000 Live Births by Women's Age Group, 1981*

Marketers take note: Italian women may be ready for contraception.



*Based on data from 11 provinces Source Family Planning Perspectives, Vol 17 No 1

COUNTRY PROFILE

# Republic of Italy

The home of Roman civilization, center of the Catholic faith, cradle of the Renaissance, and finally the seventh largest modern industrial nation. Italy has many claims to fame.

With its mountainous terrain and lack of both iron ore and coal, the country is not ideal for either agriculture or industry. Its only minerals of importance are marble and natural gas. Nevertheless, Italy ranks high on the production of steel, aluminum, cement, passenger cars, paper, textiles, clothing and television sets, and it is among the world's ten largest producers of eggs, milk, meat, wheat, and tobacco. It also is the world's largest producer of wine.

Italy ranks 13th among U. S. export markets, with a total of $4.7 billion in goods and services imported from the U. S. in 1983. From an Italian perspective, the U.S. is its third largest supplier, after West Germany and France.

The same countries are also Italy's largest export markets. In 1983, Italy exported the equivalent of $11.9 billion in goods and services to West Germany, $10.6 billion to France, and $5.5 billion to the United States. Together these countries accounted for 34 percent of all imports and 39 percent of all exports.

Italy has a turbulent history. After its struggle for independence, it was united in 1861 under King Victor Emanuel II. The two world wars were fought on different sides. In exchange for its services to the Allied forces during World War I, Italy received the Austrian province of South-Tyrol, now Bolzano, a stretch of 2,859 square miles and 430,568 people (1981), as well as the Friuli region and the city of Trieste. Even today the Bolzano area suffers occasional terrorist attacks from political groups demanding reintegration with Austria.

*continued*

## INSIDE

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THIS MONTH: ITALY

After World War II, Italy lost some small islands to Yugoslavia and Greece, and its colonies (Ethiopia, Somalia, and Libya) were placed under United Nations supervision. In 1946, a plebiscite rejected the monarchy in favor of the present republic. The 1948 Constitution established a parliamentary form of government, where political power rests with the prime minister, subject to parliamentary control. The Senate has a minimum of 320 members, the House of Representatives 630, elected for five-year terms. The most important parties are the Christian Democrats (DCI), Communists (PCI), Socialists (PSI), Neo-Fascists (MSI), Republicans (PRI), Social Democrats (PSDI), and Liberals (PLI). The Italian Communist party is the largest anywhere outside the Sino-Soviet bloc.

### CITIES AND REGIONS

With a total area of 116,374 square miles, Italy is about the size of Florida and Georgia combined. Its 56.6 million people form the second largest population in Western Europe, after West Germany, but slightly larger than Great Britain and France.

The main administrative divisions are 20 regions, subdivided into 95 provinces. The provinces in turn are divided into 8,090 *comuni* or municipalities. On the border between Emilia Romagna and Marche lies the small politically independent republic of San Marino (23.4 square miles). Another formally independent piece of Italian soil is the Vatican in Rome.

As much as 35 percent of Italy's land is taken up by mountain slopes, and another 42 percent by hills. Two regions--Valle d'Aosta and Trentino Alto Adige--consist entirely of mountainous terrain. Liguria, Umbria, Marche, Abruzzi, and Molise consist mostly of mountains and hills.

Only 23 percent of the land is reasonably flat. Most of that is in the northern Po Valley and the southern region of Puglia. This flat land contains 48 percent of the population. Thirty-nine percent lives in hilly terrain, and 13 percent in the mountains. About 28 percent of the Italian population lives in rural areas.

The six cities with more than a half-million people are Roma, Milano, Napoli, Torino, Genova, and Palermo. They account for 14 percent of the population. The 43 cities with between 100,000 and 500,000 people account for another 13 percent. There are 373 middle-sized communities with between 20,000 and 100,000 people, accounting for 26 percent of the population.

Italy has a regional problem. The line separating the regions of Emilia Romagna, Toscana, Umbria, and Lazio from the regions to the south and east is important. The regions north of it hold 62 percent of the population, but are responsible for 73 percent of the GNP and 78 percent of the industrial product. The Po Valley regions in particular, where the large industrial cities are located, hold 41 percent of the population, but account for 59 percent of Italy's industrial product.

In addition to Milano and Torino, Italy's traditional strongholds of the textile, metal, and automobile industries, Bologna and Verona, are secondary industrial centers.

Emilia Romagna, Lombardia, and Veneto are important for their agriculture, especially cattle and cereals. Ivrea, north of Torino, is the corporate headquarters of the booming Olivetti concern, at present the European leader in data processing and business automation.

The capital, Roma, is more important for its administrative and political functions than because of its industry. The only exception is the film industry, now one of the biggest in the world. In addition to its chemical and shipbuilding industries, Genova continues to be the country's largest international harbor, with roughly one-sixth of all freight and passenger movement. Trieste comes second.

The western stretch of the Ligurian coast, the continuation of the French Riviera, is an important tourist area and the favorite retirement spot for elderly people from Torino, Milano, and other industrial cities.

The regions to the south, especially Puglia, Basilicata, Calabria, and Sicilia, are economically much weaker. Only their agriculture is of importance, particularly in Sicilia, Calabria, and Puglia, which account for the bulk of Italy's vegetables, citrus fruits, and olives. On the whole, the southern regions and Sardegna hold 38 percent of the population, and produce 43 percent of the agricultural product, but only 27 percent of the total GNP and only 22 percent of the industrial product. The government is attempting to attract more industry to the south. Results of this policy are the steel plant in Taranto and the chemical complex at Brindisi. The town of Termoli (population 22,500), in the Molise region, is notable for the recent installation of Fiat's ultra-modern engine factory. Taranto is the main international port of southern Italy.

### POPULATION GROWTH

The latest Italian census was held October 25, 1981. At that time, the country counted 56.56 million inhabitants. Compared to 33.5 million at the turn of the century, this implies an average annual growth rate of .61 percent. The

**INTERNATIONAL DEMOGRAPHICS**

**PUBLISHER:** *Doris Walsh* **EDITOR:** *Denise Rusoff* **ART DIRECTOR:** *Carol Terrizzi*

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reasons for the low growth rate are the large number of people emigrating earlier in the century and the drop in the birthrate during the 1970s.

Between 1900 and 1970, nearly 20 million Italians left their country. Most settled in the United States, Argentina, and Brazil. Beginning in the 1960s, a new sort of migration was added as young Italians temporarily left to work in the more prosperous countries of northern Europe.

The birthrate, which had declined slowly to 18 per 1,000 during the 1960s, fell more rapidly during the 1970s, to 10.9 per 1,000 in 1981 and 10.3 in 1984. It is higher in the more traditional regions of the south--for example, 15 in Campania, and nearly 14 in Puglia, Sicilia, and Calabria. The birthrates in some northern regions, on the other hand, are much lower--6 in Liguria, and about 7 in Valle d'Aosta, and Emilia Romagna.

The total fertility rate (the mean number of children a woman will have borne by the end of her reproductive period) is now lower than is necessary to ensure the replacement of generations. In 1983, it was 1.5 children per woman. Only two regions--Campania and Basilicata--have a total fertility rate of 2 or more. Liguria, Emilia Romagna, Friuli Venezia Giulia, and Toscana all have total fertility rates just over 1 child per woman.

Most Italians think the current trend is a good one. Despite strong opposition from the Catholic church, Italy liberalized its abortion laws in 1978, and confirmed the measure by referendum in 1981. In 1983, a reported 28 percent of all pregnancies ended in a voluntary abortion, roughly the same share as in the United States.

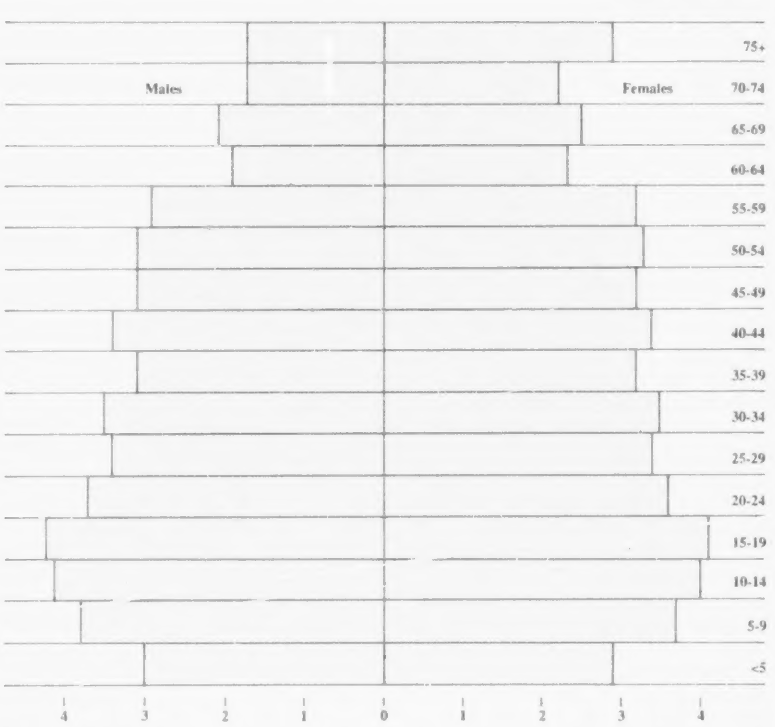
Meanwhile the death rate in Italy has changed little since 1950. At present, it hovers around 9.5 per 1,000. Some northern regions with more elderly populations have higher death rates--Liguria, 13.2 and Friuli Venezia Giulia, 12.6.

In several regions deaths actually exceed births, giving them negative natural growth rates. However, the only region where population actually declined between 1971 and 1981 is Liguria. The other regions had positive growth rates because of inter-regional migration. Since 1980, however, Piemonte has also lost population.

Life expectancy in Italy is 70.6 years for men and 77.2 years for women, about the same as in the United States. The infant mortality rate has come down since the 1960s and is now about the same as in the United States--11.6 per 1,000 in 1984. The highest rates (over 15 per 1,000 in 1982-83) are found in Campania, Puglia, Basilicata, and Sicilia. Veneto, Fruili Venezia Giulia, and Trentino Alto Adige now

*continued*

**Population of Italy by Age and Sex: 1981*** *(in percent)*



| *Age* | *Total* | *Males* | *Females* |
|---|---|---|---|
| All ages | 55,928,500 | 27,215,350 | 28,713,150 |
| 0-4 | 3,309,550 | 1,702,350 | 1,607,200 |
| 5-9 | 4,199,400 | 2,145,650 | 2,053,750 |
| 10-14 | 4,554,050 | 2,314,400 | 2,239,650 |
| 15-19 | 4,663,950 | 2,364,500 | 2,299,450 |
| 20-24 | 4,068,650 | 2,042,500 | 2,026,150 |
| 25-29 | 3,795,800 | 1,888,400 | 1,907,400 |
| 30-34 | 3,959,300 | 1,979,250 | 1,980,050 |
| 35-39 | 3,509,500 | 1,741,300 | 1,768,200 |
| 40-44 | 3,769,300 | 1,878,000 | 1,891,300 |
| 45-49 | 3,552,650 | 1,740,900 | 1,811,750 |
| 50-54 | 3,538,800 | 1,716,750 | 1,822,050 |
| 55-59 | 3,392,250 | 1,612,300 | 1,779,950 |
| 60-64 | 2,330,550 | 1,068,500 | 1,262,050 |
| 65-69 | 2,575,650 | 1,156,500 | 1,419,150 |
| 70-74 | 2,151,900 | 924,600 | 1,227,300 |
| 75+ | 2,557,200 | 939,450 | 1,617,750 |

* *The slight difference with respect to total population is due to the fact that these data are provisional.*
*Source: ISTAT, Censo Generale della Popolazione, 1981: Dati Provvisori.*

## TIPS ON TRENDS

### Brazil's Economy Heats Up

After several years of economic austerity, during which incomes were but an average of 11 percent in relation to 1979, the new democratic government of President Sarney seems determined to get the Brazilian economy back on a pattern of steady growth.

The consequences of new policies are already evident. The GNP, which was earlier this year expected to grow by 5 percent, grew instead by 7 percent. The legal minimum wage, which is adjusted each six months in order to correct the 220 percent annual inflation rate, has twice been raised more than the inflation rate, even though its average value of about $55 continues to place the Brazilian minimum wage among the lowest in the world.

In July of 1985, the payrolls of Brazilian industry showed a 17 percent increase per employee compared to the previous year.

The immediate result of these favorable economic trends is an outburst of consumer spending. In the large cities, sales of color television sets during the first nine months of 1985 rose by almost 30 percent over 1984 sales. Mixers, stereos, and videocassette recorders are also in great demand. Commerce was expected to close the year with a 20 percent increase in sales over 1984. Marketing is once again becoming the dominant concern of business. According to a survey conducted by the Coopers & Lybrand consulting firm, the real salaries (after adjusting for inflation) of marketing executives in Brazilian companies increased 37 percent from February to August, whereas those of company presidents rose by 11 percent.

The most important "if" about pulling the Brazilian economy out of its slump is whether it can be done without catapulting the inflation rate to Argentinian levels. The present rate of slightly over 200 percent is high, but has been stable since 1983. Nevertheless, the 14 percent registered in the middle of last summer is a warning of what can happen if too much is done too quickly.

*--Ralph Hakkert*

*Ralph Hakkert, a demographer, is* International Demographics' *correspondent in Brazil.*

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have infant mortality rates of less than 10 per 1,000.

Nearly 5 million Italians live outside Italy, especially in West Germany, Switzerland, and France. The United States also continues to be an important destination. Migrants don't always move in the same direction because many of those who work abroad return to Italy in the end. The most recent peak of migration fell in the 1950s and early 1960s. In the late 1970s, return migration actually exceeded out-migration, but in the early 1980s the number of those leaving once again increased. At the same time Italy is also a recipient of international migration, mainly from Yugoslavia and North Africa. As for U. S. citizens, the average annual immigration flow in the 1960s and early 1970s was estimated at 2,700.

Internal migration has also changed direction in recent years, reflecting a shift from an industrial society. During the 1950s and 1960s, the primary destinations of internal migrants were the industrial cities Piemonte, Lombardia, and Liguria, as well as the city of Roma. The principal out-migration areas were the southern agricultural regions of Basilicata, Molise, Calabria, Sicilia, Abruzzi, Puglia, and Sardegna. Another migration stream ran east-west from the regions of Veneto and Friuli Venezia Giulia towards the cities of Torino and Milano.

During the 1970s, this pattern changed. Regions that formerly lost residents--Marche, Umbria, Veneto, and Friuli--are now net recipients. Migrants from south to north have diminished.

Cities such as Torino and Milano are losing population. On the whole, cities with more than 250,000 people lost 5.3 percent of their population between 1971 and 1983, whereas the medium- sized towns, with 10,000 to 250,000 people, grew by 15 percent. This is a trend similar to that in the United States. Among the ten largest cities of the country, the only ones to grow in recent years are Palermo and Catania.

For now, Italy's population growth has almost ceased. Depending on the rhythm of further fertility decline, the population may start decreasing at some point during the 1990s. Projections prepared by Italy's Central Institute of Statistics (ISTAT) indicate a probable population size of 55.8 to 57.4 million shortly after the turn of the century.

#### HOUSEHOLDS AND FAMILIES

With its low birthrate and out-migration of young adults, Italy is aging. The median age is about 34 years, and 13 percent of the population is aged 65 and older.

According to current population projections, the median age should increase another 4 to 5 years before the turn of the century, and the percentage of elderly is expected to rise to 17 percent within the next 15 years.

The figures do, however, vary considerably from one region to the next. Most of the southern regions (except Abruzzi and Molise), with their higher birthrates, typically have a lower median age, about 28 to 31 years, and a percentage of elderly that varies from just under 10 percent in Campania to just over 12 percent in Basilicata.

As a retirement area, Liguria has an extremely old population with a median age of nearly 42 years and 18.2 percent of its population aged 65 and older. Piemonte, Friuli Venezia Guilia, Emilia Romagna, Toscana, Umbria, and Marche all have populations with median ages over 37.5 years and more than 15 percent elderly.

Despite the stereotypical image of the large Italian family, household size in Italy, as in other industrialized countries, is declining, from a mean of 3.6 in 1961 to 3.4 in 1971 and 3.0 in 1981. This is about the same average size as U. S. households were in the early 1970s. The cause is

# AT A GLANCE: ITALY

### Oldest

Liguria
Piemonte
Friuli Venezia Giulia
Emilia Romagna
Toscano
Umbria
Marche

### Youngest

Basilicata
Calabria
Sicilia
Sardegna
Puglia
Campania

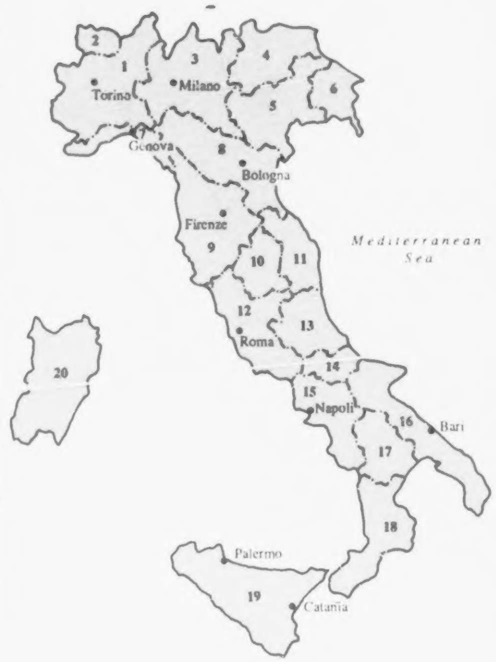
### Most Working Women

Emilia Romagna
Piemonte

### Percent of Italian Homes with Amenities

| | |
|---|---|
| Running Water........ | 93.2 |
| Indoor Toilets.......... | 94.0 |
| Electricity................. | 99.5 |
| Central Heating........ | 90.7 |
| Baths or Showers.... | 86.4 |
| All Amenities........... | 79.5 |
| All Amenities/South | 60.0 |

### ITALY



**The Fifteen Largest Cities**

| | | | |
|---|---|---|---|
| 1. Roma (Rome) | 2,840,259 | 8. Firenze (Florence) | 448,331 |
| 2. Milano (Milan) | 1,604,773 | 9. Catania | 380,328 |
| 3. Napoli (Naples) | 1,212,387 | 10. Bari | 371,022 |
| 4. Torino (Turin) | 1,117,154 | 11. Venezia (Venice) | 346,146 |
| 5. Genova (Genoa) | 762,895 | 12. Verona | 265,932 |
| 6. Palermo | 701,782 | 13. Messina | 260,233 |
| 7. Bologna | 459,080 | 14. Trieste | 252,369 |
| | | 15. Taranto | 244,101 |

*Source: ISTAT, Le Regioni in Cifre, 1985*

### Highest Unemployment

Calabria
Sicilia
Sardegna
Campania
Basilicata
Puglia
Molise

### Lowest Unemployment

Valle d'Aosta
Lombardia
Trentino Alto Adige

### Densest

Lombardia
Liguria
Campania
Lazio

### Most Affluent

Lombardia
Emilia Romagna

### Regions

NORTH

1. Piemonte (Piedmont)
2. Valle d'Aosta (Aosta Valley)
3. Lombardia (Lombardy)
4. Trentino Alto Adige
5. Veneto (Venice)
6. Friuli Venezia Giulia
7. Liguria
8. Emilia Romagna

MIDDLE

9. Toscana (Tuscany)
10. Umbria
11. Marche (Marshes)
12. Lazio (Latium)

SOUTH

13. Abruzzi
14. Molise
15. Campania
16. Puglia (Apulia)
17. Basilicata
18. Calabria

ISLANDS

19. Sicilia (Sicily)
20. Sardegna

**The Regions of Italy: By Population, Households, Population Density, and Annual Growth Rate.**

| | population in 1981 | households in 1981 | population density in 1981 | average annual growth rate 1971-81 |
|---|---|---|---|---|
| 1. Piemonte | 4,479,410 | 1,661,546 | 456.6 /sqm. | 0.10% |
| 2. Valle d'Aosta | 112,353 | 43,601 | 89.2 | 0.29 |
| 3. Lombardia | 8,891,652 | 3,081,787 | 964.9 | 0.40 |
| 4. Trentino Alto Adige | 873,413 | 282,038 | 166.0 | 0.37 |
| 5. Veneto | 4,345,047 | 1,375,062 | 612.6 | 0.52 |
| 6. Friuli Venezia Giulia | 1,233,984 | 449,874 | 407.2 | 0.17 |
| 7. Liguria | 1,807,893 | 726,577 | 863.9 | -0.25 |
| 8. Emilia Romagna | 3,957,513 | 1,399,163 | 463.1 | 0.28 |
| 9. Toscana | 3,581,051 | 1,234,928 | 403.2 | 0.31 |
| 10. Umbria | 807,552 | 265,069 | 247.2 | 0.40 |
| 11. Marche | 1,412,404 | 451,121 | 377.2 | 0.38 |
| 12. Lazio | 5,001,684 | 1,630,215 | 752.7 | 0.65 |
| 13. Abruzzi | 1,217,791 | 391,250 | 292.1 | 0.43 |
| 14. Molise | 328,371 | 109,137 | 191.6 | 0.26 |
| 15. Campania | 5,463,134 | 1,569,644 | 1,040.3 | 0.77 |
| 16. Puglia | 3,871,617 | 1,148,744 | 518.1 | 0.78 |
| 17. Basilicata | 610,186 | 188,597 | 158.1 | 0.12 |
| 18. Calabria | 2,061,182 | 622,313 | 353.9 | 0.36 |
| 19. Sicilia | 4,906,878 | 1,540,255 | 494.1 | 0.47 |
| 20. Sardegna | 1,594,175 | 461,416 | 171.3 | 0.79 |
| Total | 56,556,911 | 18,632,337 | 486.0 | 0.44 |

*Source: ISTAT, Le Regioni in Cifre, 1985.*

not only declining birthrates, but also the increasing number of households. According to United Nations projections, the number of households should increase from 18.6 million in 1981 to 20 million in 1990 and 22.2 million by the year 2000, when the average household size should be only about 2.8 persons. The percentage of one-person households is up from about 11 percent in 1961 and 13 percent in 1971 to nearly 18 percent in 1981, while the percentage of those with five or more people fell from 17 percent in 1961 to 22 percent in 1971 to 15 percent in 1981.

Again there are regional variations--from 2.5 members per household in Liguria to 3.4 members per household in Puglia. Women, especially widows, are the heads of 70 percent of all one-person households. Of the households consisting of more than one person, only 9.4 percent are female headed, according to the 1981 census.

As in other European countries, Italian marriage rates have dropped in the past decade from 7.5 per 1,000 people in 1971 to 5.3 per 1,000 people in 1984. Only a small part of this trend is explained by age distribution. Mean ages at first marriage are on the rise: in 1981, they were 27 years for men and 24 years for women. Of men aged 15 and older, 30 percent are single and 3 percent widowed. Of women aged 15 and older, 23 percent are single and nearly 14 percent are widowed.

Informal unions in Italy are still relatively rare compared with other European countries, but illegitimate births are on the rise, from 2 percent in 1967 to nearly 5 percent in 1983.

A sweeping 86 percent of all Italian couples still choose a religious marriage ceremony. Marriage rates are highest in Campania and lowest in Friuli Venezia Giulia, Emilia Romagna, Liguria, and Toscana. Divorce was legalized in 1970. With opposition from the Catholic church, the decision was ratified in 1974. Nevertheless the number of divorces remains small: 14,600 in 1982, in addition to 33,000 separations. The former figure constitutes 4.7 percent of the number of marriages in the same year, compared with 47.3 percent in the United States. The number of divorced or separated as a percentage of the population aged 15 and older is 1.1 percent for men and 1.3 percent for women.

## HOUSING AND CONSTRUCTION

There were 21.9 million houses and apartments and 99,300 improvised dwellings counted in the 1981 census. Of the former only 17.5 million were occupied.

Vacancy rates were highest in Valle d'Aosta (48 percent), Calabria, Sicilia, and Molise (29 percent); and lowest in Lombardia (12 percent), Veneto (16 percent), and in large cities such as Roma (10 percent), Milano (6 percent), and Torino (7 percent). The number of improvised living arrangements is insignificant except in Campania (46,700 units).

Fifty-nine percent of Italian families own their own homes. With only 213,000 homes built in 1983, the construction industry is not dynamic, although it accounts for 7 percent of the GDP and 9 percent of all employment. About 30 percent of all homes were built before World War II, a percentage that varies from 22.6 percent in Lazio and 24.6 percent in Sicilia, to 41 percent in Molise and 39 percent in Liguria.

## ETHNICITY AND RELIGION

Culturally, Italy is a homogeneous country. Data on religion do not even exist because so few people--perhaps 300,000 Protestants and 50,000 Jews--are not Catholic. The most important ethnic and linguistic minority is the Austrians in the Bolzano province, many of whom favor reintegration with Austria. About two-thirds of the Bolzano population speak German, while less than 5 percent speak Ladin, a Roman language akin to Italian.

## EDUCATION

Only about 3 percent of Italy's population aged 6 and over cannot read or write. There is variation among regions, but even Calabria, where illiteracy is most prevalent, has a rate of only about 9 percent.

Secondary education is divided into two stages: 24 percent of the population had completed (in 1981) up to junior high school, and 11.5 percent had received a high school diploma. Higher education continues

**Labor Force of Italy, by Industry, by Sex: 1981**

| | *Males* | *Females* | *Total* |
|---|---|---|---|
| Agriculture, Forestry and Fishing | 1,434,300 | 804,500 | 2,238,800 |
| Coal, Gas and Oil Mining and Refining | 57,500 | 9,350 | 66,850 |
| Utilities | 159,250 | 18,700 | 177,950 |
| Chemical and Mineral Industries | 748,000 | 165,750 | 913,750 |
| Metal and Machinery Industries | 1,825,900 | 411,450 | 2,237,350 |
| Food, Clothing, and Other Industries | 1,509,100 | 1,225,700 | 2,734,800 |
| Building and Construction | 1,743,500 | 77,150 | 1,820,650 |
| Commerce, Restaurants, Hotels | 2,151,400 | 1,291,150 | 3,442,550 |
| Transport and Communication | 1,084,850 | 164,500 | 1,249,350 |
| Finance and Insurance | 628,850 | 282,950 | 911,800 |
| Public Administration and Defense | 877,850 | 306,600 | 1,184,450 |
| Social and Personal Services | 1,213,150 | 1,794,850 | 3,008,000 |
| Total | 13,433,650 | 6,552,650 | 19,986,300 |

*Source: ISTAT, Censimento Generale della Popolazione, 1981: Dati Provvisori.*

to be a privilege attained by only about 3 percent of the population. This percentage is roughly the same in the north and south of the country. It is, however, somewhat higher in the central part because of the number of university-educated people in Roma.

In 1983-84, Italy had 4 million elementary school students enrolled in 28,786 schools; 2.5 million students in 10,057 junior high schools; and 2.5 million in 5,580 senior high schools.

There are 44 universities with 1 million students in 1983-84, 45 percent of whom were women. Universities are still expanding slightly, but declining birthrates are already taking their toll on elementary school enrollment which is declining. Italy attracts foreign students at the university level, especially from Greece, Syria, Somalia, and Venezuela. There is even a special university for foreigners in Perugia.

### ECONOMY AND LABOR FORCE

In 1984, there were 23 million people in Italy's work force. Among the economically inactive, 33 percent were younger than age 14, 30 percent were housewives, 23 percent were retired, and 11 percent were students.

Nearly 55 percent of men were in the labor force, about the same as in the United States. But the participation rate of women was lower than in the United States at about 28 percent. In 1971, only 22 percent of women were in the labor force, but while the share has increased somewhat the economic recession of recent years has denied women expanded career opportunities. Working women are more common in the developed north (nearly 37 percent in Emilia Romagna and 34 percent in Piemonte) than in the more traditional south (18 percent in Sicilia and 21.5 percent in Calabria). On the whole, labor force participation for both sexes is highest in Piemonte, Valle d'Aosta, Emilia Romagna, and Lombardia, and lowest in Sicilia, Calabria, Sardegna, and Liguria.

***Italian labor force statistics are hard to interpret because of differences in various sources.***

Italian labor force statistics are hard to interpret because of differences in various sources. This is particularly true for unemployment, a social problem of increasing importance. According to the statistical yearbooks, 10.4 percent of the Italian labor force was unemployed or looking for work for the first time in 1984, up from 8.4 percent in 1981. The 1981 census, however, found the much higher rate of 14.8 percent. The discrepancies are stronger in the south.

Part of the reason is that Italy has a significant informal sector of employment--*economia sommersa* (submersed economy)--which may account for as much as 20 to 30 percent of GDP. Officially only 230,000 people are registered as unemployed and therefore eligible for unemployment benefits ranging from $40 to $250 a month. The majority of the unemployed find some employment in the informal sector.

Because of the submersed economy the 170 percent difference officially reported between the per capita GDP of the richest region, Valle d'Aosta, and the poorest, Calabria, may be overstated. In its most extreme form, the informal economy is linked to the crime syndicates for which the area is notorious: the mafia in Sicilia, the camorra in Napoli, and ndrangheta in Calabria. The control of these syndicates over the economy also affects the formal sector, especially the banks that are needed to launder the money earned from crime. For this reason, an insignificant provincial town such as Trapani, in Sicilia, has as many banks as the world banking capital, Zurich.

Agriculture still occupies nearly 12 percent (1984) of the working population although it has declined from about 20 percent in 1971. According to the 1982 agricultural census, the number of farms fell from 3.6 million to 3.3 million between 1970 and 1982, whereas the total cultivated area declined from 62 million to 58 million acres. The sharpest decreases occurred in Liguria and Calabria. At present, employment in agriculture varies from 4 percent in the highly industrialized Lombardia to 29 percent in the rural Basilicata region and 28 percent in Molise. Farm sizes vary from an average 9 acres in Campania to 48 acres in Valle d'Aosta.

The relative importance of the industrial sector is also declining, from 40 percent of the employment to only 34 percent. The share of

## TIPS ON TRENDS

### West German Teachers Out of Work

There are currently at least 100,000 unemployed teachers in West Germany, and it is expected that by 1990, every fifth teacher will be out of work. After construction workers, teachers make up the second largest group of unemployed in Germany.

Demographic factors indicate that the 120,000 education students now preparing for final comprehensive exams have little chance of finding employment because the number of school children will decline by 1.9 million between now and 1990.

### Eating Habits Change

West Germans are forsaking the traditional full-course midday meal including soup and dessert for smaller, often cold, lunches, according to the West Berlin-based Association for Grain, Market and Nutrition Research. Fewer than half of the six million daily canteen patrons in West Germany still opt for a hot lunch, the research group says. On the average, 60 percent now prefer a little snack, and more company cafeterias are serving sandwiches, yogurt, salads, and fruits.

GDP has declined from 39 percent to 36 percent.

Textiles and clothing employ nearly a quarter of all manufacturing workers; wood and furniture, 9 percent; food, beverage, and tobacco, 8.5 percent; metal, 7.5 percent; non-metallic minerals, 7 percent; and machinery, 7 percent.

The tertiary sector now accounts for more than half of the official economy (52 percent of the working population and 57 percent of the GNP in 1983). In 1984, its share of employment varied from 71.5 percent in Lazio and 64 percent in Liguria to 45 percent in Marche and 46 percent in Basilicata.

Commerce is a particularly important activity in this country which has the world's second highest absolute income ($8.9 billion in 1980) from tourism, after the United States. According to the statistical yearbook, 20 percent of the working population was occupied by this sector in 1983. Italian hotel capacity is the third largest in the world after the United States and France. By far the most tourists come from West Germany, followed by Austria, United Kingdom, France, Switzerland, and the United States. The most popular tourist areas, according to hotel bookings, are Veneto, Trentino Alto Adige, Emilia Romagna, and Toscana.

In 1984, average annual family income varied from the equivalent of about $15,900 (24.2 million lire) in Emilia Romagna to $9,500 in Sicilia. Taxes typically account for about 20 percent of income for a manufacturing worker, with a wife at home and two children. While this seems low, most taxes in Italy are indirect. The social security system does not spend much on unemployment benefits. Its largest budget items are the 13.9 million retirement pensions, which cost nearly 58 billion lire in 1982.

### CONSUMPTION

Mean annual household budgets in 1983 varied from the equivalent of $11,950 in Lombardia to $7,400 in Molise, with a national average of $10,026. The main expenditures are food, 30 percent; transport, nearly 14 percent; housing, nearly 13 percent; clothing, 9 percent; and furniture, 7 percent. The patterns vary among regions. Whereas the typical family in Campania and Sardegna spends 37 percent of its budget on food, this proportion goes down to 26 percent in Friuli Venezia Giulia or Emilia Romagna. Housing takes up nearly 14 percent of the average household budget in Liguria, but only about 10 percent in Calabria. The colder climate of Piemonte requires greater expenditures on heat and electricity (nearly 7 percent) than in Sicilia, where it is only about 3 percent of the household budget.

Known for their spaghetti and other pasta, the Italians eat nearly 80 pounds of different types of noodles a year, in addition to 163 pounds of bread. At twice the United States' level, the overall consumption of cereals in Italy is the highest of any western developed country, accounting for nearly 4 percent of the average household budget.

In compensation, the Italian vegetable consumption is the second highest in the world, after Portugal. Vegetables account for nearly 20 percent of all food expenditures. Eating habits also vary regionally. Whereas the average Sicilian eats as much as 115 pounds of noodles and 213 pounds of bread a year, the average Venetian keeps to 54 and 125 pounds, respectively. Fish is a more common item in Campania (32 pounds per capita per year), Sicilia (27 pounds), Puglia or Marche (26 pounds) than in the northern regions, especially those that are landlocked. The annual meat consumption, which amounts to 115 pounds per capita nationally, is more evenly spread and about a third lower than in the United States. Nevertheless, it takes up 10 percent of the average household budget.

As the world's leading wine producers, Italians believe in wine consumption: 21.8 gallons per capita per year, slightly more than the per capita milk consumption of 20.8 gallons. It is for this reason that Italians live with the world's highest incidence of liver ailments. Actually, annual wine consumption has declined from 30.9 gallons per capita in 1968. At present, it is the world's second highest after France.

### TRANSPORT AND COMMUNICATIONS

Italy's 3,670 miles of toll highways, or *autostrade*, are internationally known for their fine engineering. In 1982, there were 19.6 million registered passenger cars, 1.58 million trucks, and 66,700 buses. On a per capita basis, private car ownership is higher than in large car-producing countries such as Great Britain or Japan, but lower than in West Germany, the U. S., or France. Italy is also well-known for its motorcycles and scooters. In 1982, there were 3.56 million light motorcycles for use within cities. There were also 1.23 million scooters and heavier motorcycles.

Besides private transportation, Italians use their 10,000 miles of railway. The Italian railway system is the fifth largest in Europe, after the Soviet Union, France, Poland, and West Germany.

As in some other European countries, radio and television sets in Italy have to be registered and are subject to a fee in order to function legally. In 1983, there were 8.4 million registered black and white and 5.5 million color television sets, Only 382,000 radios are registered, but that is a gross understatement.

The Italian television network (RAI) is government operated and has three channels. Commercials occupy 7 percent of total broadcasting time. The RAI radio network also has three channels in addition to regional broadcasting stations.

There were 14.7 million telephones in 1982, or 25.9 per 100 residents. Regionally, the number varies from 39.1 in Liguria to 14.2 in Calabria.

Italians are movie goers with more than 9,000 cinemas in their country.

There are 111 daily newspapers with a total circulation of 5.54 million. Most are published in Roma, Genova, and Milano. In addition there are 617 weekly news journals, with a circulation of 18.2 million.

### SOURCES

The government agency in charge of basic statistics is the Central Institute of Statistics (ISTAT), located at Via Cesare Balbo 16,00100 Roma, Italy; telephone 5423003; telex 610338 ISTAT. Each year it processes an average of 180 surveys, about 10 of which have demographic relevance. At the time of this writing, the final results of the 1981 census had not yet been completely published. Preliminary figures were available from *Primi Resultati Provinciali e Comunali sulla Popolazione e sulle Abitazioni*, and from *Dati sulle Caratteristiche Strutturali della Popolazione e delle Abitazioni*, based on a 2 percent sample. Two publications, *Le Regioni in Cifre* (1985) and the *1984 Compendio Statistico Italiano*, already contain many of the final counts. A census of industry, commerce, and services was held at the same time as the population census, and an agricultural census was held in 1982. Together, the 1981-82 census results occupy 385 volumes.

Most ISTAT publications are in Italian, but a bilingual summary of statistics was prepared for the 1985 IUSSP Conference in Florence, entitled *Introducing Italy*. The Institute of Population Research (IRP), Viale Beethoven 56,00144 Roma, Italy; telephone 5921474, prepared a similar report, entitled, *The Italian population: an overview--Demographic profiles of the Italian regions*. Other useful ISTAT publications are the *Annuario Statistico Italiano* which is somewhat more extensive than the *Compendio Statistiche Sociali* (1981) and the *Notiziario* (Vol. 5, No. 5, July 1985) which presents the results of a household and family survey carried out in 1983.

More detailed information on household budgets can be found in the supplement to No. 10 of the *Bollettino Mensile de Statistica of 1984*. •

*--Ralph Hakkert is a demographer in Brazil. He attended the IUSSP conference in Florence in July 1985 as an invited presenter and collected much of the available information on Italy while in that country.*

## CONFERENCES

### Marketing

Media research, advertising and research, retail strategies and worldwide consumers will be 1986 subjects of seminars presented by the European Society for Opinion and Marketing Research (ESOMAR).

April 9-12, in Helsinki, will be "New Developments in Media Research," including print media, television, and radio, and new media such as viewdata, teletext, and prerecorded video tapes.

June 4-6, in Brussels, will be "Retail Strategies for Profit and Growth." General subjects will be strategic approaches to retailing, improving operating results through increased productivity, and new distribution channels.

June 30-July 2 in Tokyo, there will be a joint conference with the Japan Marketing Association and the Advertising Research Foundation of the United States. The subject will be "Marketing, Advertising and Research; Are There East and West?"

September 14-18 in Monte Carlo will be ESOMAR's annual congress on the theme of research as information for anticipating change and making decisions. Subjects include global consumers, new product development, advertising and communication, and qualitative research among others.

For information and registration materials for ESOMAR conferences and seminars, contact ESOMAR Central Secretariat, J. J. Viottastraat 29, 1071 JP Amsterdam, The Netherlands; telephone (020) 64.21.41; telex 18535 esmar nl.

### Political Risk

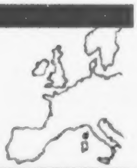
African business opportunities and risks will be the subject of a seminar by Frost and Sullivan's political risk services in New York City on February 28.

Other Frost and Sullivan seminars for the spring include a Latin American Symposium, April 28 and 29 in Miami; Risk and Profit in Southeast Asia, April 10 in Dallas; the 10th annual international conference on political risk, May 13 and 14 in London; and Caribbean Basin Business Opportunities and Risk, June 12 and 13 in New York City.

For more information, contact Frost and Sullivan, Inc., Dept. PRS-RE41, 106 Fulton Street, New York, NY 10038. •

# REGIONS

## *EUROPE*



### West Germany

Home ownership is still important to all segments of society in West Germany, according to data from the Central Association of House, Apartment, and Land Owners. The group's figures show that nearly 46 percent of all West German households owned some real estate in 1983, an increase of about one-third since 1969. Association president Theodor Paul said that 93 percent of all farmers own property. Of people in business for themselves, 72 percent own real estate. About 54 percent of civil servants and nearly 50 percent of worker households had a house, co-op apartment, or piece of land to call their own. Among the unemployed and the retired, the figures were nearly 28 percent and 36 percent, respectively.

### Great Britain

Household size in Great Britain is declining, according to preliminary findings of the 1984 General Household Survey released in 1985.

Household size in 1984 reached a low of 2.59 persons from 2.91 persons in the early 1970s. The trend toward smaller average household size is attributed mainly to an increase in the proportion of one-person households and a reduction in the proportion of large households containing five or more persons.

In the 1984 survey, 25 percent of households had only one person, compared with 23 percent of households a year earlier. Six percent of households had five people, compared with 7 percent a year earlier.

A new question under the consumer-durables portion of the survey asks whether a household has a home computer. Nine percent of those surveyed reported having a home computer. In 1983, the first time the question was asked, 18 percent of households said they had a video. By 1984, that proportion had risen to 24 percent of households.

**Fastest-Growing Areas in the San Juan Primary Metropolitan Statistical Area: 1980-1983**

| *City* | *1983 Population* | *% Change 1980-1983* |
|---|---|---|
| Loiza | 24,600 | 17.8 |
| Rio Grande | 37,400 | 9.0 |
| Florida | 7,800 | 7.8 |
| Humacao | 49,200 | 6.7 |
| Corozal | 30,000 | 6.4 |
| Toa Alta | 33,700 | 5.5 |
| Dorado | 26,900 | 5.4 |
| Juncos | 26,700 | 5.2 |

*Source: Bureau of the Census, Local Population Estimates Series P-26, No. 83-51-C.*

## *SOUTH AMERICA*

### Puerto Rico

Although officially part of the United States, many U. S. companies include Puerto Rico among their international markets. Puerto Rican data are available from the U. S. Department of Commerce.

The most recent estimates of Puerto Rico's population are included in a new Census Bureau publication--Series P-26, No. 83-51-C--Estimates of the Population of Puerto Rico Municipios and Metropolitan Areas, July 1, 1981, 1982, and 1983.

The estimated population of Puerto Rico in mid-1983 was 3.2 million, up 2.2 percent since the 1980 census. Nearly 2.6 million people live in metropolitan areas, and 690,000 live in nonmetro areas.

Puerto Rico has four metropolitan statistical areas. The fastest growing in the early 1980s was Mayaguez on the western coast. It grew 4.8 percent between 1980 and 1983. Despite its high growth rate, Mayaguez has a total population of only 210,000. Aguidilla grew only about 0.5 percent during the period to reach 153,500 people. The Arecibo MSA grew 1.6 percent to 162,900 people, and the largest metropolitan statistical area, Ponce, grew by 1.7 percent to 236,400 people.

The only consolidated metropolitan statistical area (CSMA) is San Juan-Caguas with a population of 1.8 million residents. The areas within the San Juan PMSA (primary metropolitan statistical area) between 1980 and 1983 are listed in the table.

## ASIA

### Seoul, South Korea

In an attempt to keep the population of Seoul to no more than 10 million people by the year 2000, the government of the Republic of Korea is implementing policies to encourage growth in areas other than Seoul. At present, Seoul has about 9.5 million residents, a quarter of the total population of South Korea.

The government provides tax incentives for industrial facilities that move out of Seoul. It is also establishing satellite cities around new cities in which to settle immigrants, and it is upgrading and expanding educational facilities at the high school and college levels in nonurban areas. Government offices and corporations are also being moved outside of Seoul, and incentives are offered to individuals to encourage them to stay in rural areas rather than moving to the cities.

### Japan's working women

For the first time in 1984, the number of working women in Japan outnumbered housewives. The percentage of working women (aged 15 and over) and housewives as a percentage of all women was the same in 1984--31.6 percent. However, in actual numbers, there were 15,180,000 working women, about 20,000 more than housewives.

The large increases in working women come from among those who are aged 35 to 54. The reasons given for the increases among these women--most of whom are married--are reduced burdens of housework and child care; increased possibilities for part-time work; a shortening of the time taken to rear children; more highly educated women; and changes in social attitudes that make it more desirable to work.

At the same time that the percentage of working women among 20-to-24-year-olds fell from 29 percent in 1970 to nearly 17 percent in 1984, the share of those aged 35 and over who were working rose from 39 percent to nearly 57 percent.

Women are also working longer. In 1976, almost 63 percent had fewer than five years of service, and only 15 percent had more than ten years of service. By 1984, only 45 percent had fewer than five years of service and 23 percent had more than ten years.

### Births, deaths, and marriages in Japan

There were 1,489,786 births in Japan in 1984. Except for 1966, this was the first time since 1905 that the number of births dropped below 1.5 million.

The crude birthrate per 1,000 population, which has been declining since 1974, was 12.5, the lowest since the government began collecting its data in 1889.

The crude death rate remains the same as in 1983 at 6.2 deaths per 1,000.

A total of 739,993 couples got married in 1984, a decrease of 22,559 compared with the prior year. The marriage rate per 1,000 population fell to 6.2, the lowest since 1899.

### Vietnam

Estimates from the U. S. Census Bureau are that Vietnam's population is now about 60 million, up from 53 million in 1979.

A new report from the Census Bureau reveals a number of trends:

--Vietnam has a young population and a shortage of men created by war losses.

--The birthrate is high and the death rate fairly low.

--Campaigns to resettle minority groups and move people from densely populated areas to new economic zones have had mixed results.

Copies of the report which includes information on women in the labor force, urban populations, marriage, family planning, and other trend data are available for $2.00. Order *The Population of Vietnam*, Series P-95, No.77 (GPO Stock No. 003-024-06360-3) from Superintendent of Documents, U. S. Government Printing Office, Washington, DC 20402.

## NORTH AMERICA

### Canada

After adjustments for inflation, average incomes of families and singles were virtually unchanged in Canada between 1983 and 1984, according to data from Statistics Canada. Average family income of $35,853 (Canadian dollars) is about the same as in 1983 after adjustments for inflation.

Families with heads under age 25 had the lowest average at $22,419 while those with heads aged 45 to 54 had the highest at $43,755.

The average income of female-headed families was $20,788--about half that of the average received by male-headed families.

For more details, order *Income Distributions by Size in Canada Preliminary Estimates*, 1984, (13-206, $10), from Statistics Canada, Publications Sales and Services, Room 1710, Main Building, Statistics Canada, Ottawa K1A OT6, Canada, or contact the Data Dissemination Unit, Household Surveys Division, of Statistics Canada, telephone (613) 990-9775.•

## COMING UP

**Melbourne**: A sprawling, low-density city with substantial promise

**Australia's APASCO** offers special marketing services

# PUBLICATIONS

**Family Budgets, Comparative Tables.**1984, Brussels: Statistical Office of the European Communities, 196 pp., $3.50. Order from European Community Information Service, 2100 M Street, NW, Suite 707, Washington, DC 20037.

This comparison of expenditures for different kinds of households includes the four largest European countries--West Germany, France, Italy, and the United Kingdom.

Data from 1979 outline general information on households and accommodations, by country. In all tables, the data have been made as comparable as possible. For example, one can easily scan the statistics and learn that in West Germany nearly 28 percent of households contain only one person, whereas only about 22 percent of households in the U.K. fall into that category. Construction and ownership of housing is covered, as is the percent of households that own consumer durables, such as televisions, refrigerators, dishwashers and the like. Socioeconomic data according to the type of household are also compared.

The second part of the volume provides expenditure data by type of household, socioeconomic category of the head of household, income category, region, and urban and rural. The expenditure data ranges from food, beverages, tobacco, to household furnishings, insurance premiums, travel goods, and apparel, and includes more than 350 individual categories.

The data in this volume were collected in 1979, but the fact that they are presented comparatively provides an opportunity to examine potential markets side-by-side.

**British Social Attitudes,** the 1985 report, edited by Roger Jewell and Sharon Witherspoon, 1985, Hants, England: Gower Publishing Company, Ltd., 256 pp., $41.95. Order from Gower Publishing Company, Old Post Road, Brookfield, VT 05036.

The British get about 60 percent of their news about their country from television, 20 percent from newspapers, and 15 percent from the radio. Fifty-seven percent of them find television the most believable source of news. These are just two interesting bits of information gleaned from the pages of the second in a series of *British Social Attitudes* reports.

The information is obtained from about 1,700 interviews carried out by Social and Community Planning Research among a nationwide survey. The series seeks to chart changes in British social values during the 1980's in relation to other changes in society.

Other subjects are consumer prices and incomes, sex roles, attitudes toward defense and international affairs, and morality in public life.

On the reasons for working, for example, 58 percent of women said they work for basic essentials; 81 percent of men also gave that reason. Only 45 percent of men said they enjoy working, but 59 percent of women gave that response. Women who work part-time were less likely to say they work for basic needs than were women who work full-time.

**The Social Progress of Nations** by Richard J. Estes, 1984, New York: Praeger, 208 pp., inc. tables,$24.95.

This study reports and evaluates data that show social progress--as the author explains, "that is, the extent of national and global changes in adequacy of social provision as measured by the Index of Social Progress." A distinction is made between "quality of life," and the adequacy of social provision. This is a more objective view than "quality of life."

For example, Estes found significant progress in achieving social development, as evidenced by "increases in the proportion of age-eligible children enrolled in primary school, decreases in adult illiteracy, reductions in overall infant mortality, decreases in the number of people served per physician, and increases in suffrage for women," along with several economic and political factors.

The major findings are neatly summarized into one chapter and provide a convenient brief on what social changes have been wrought in the world in the last decade, in case they have somehow passed notice until now. ●

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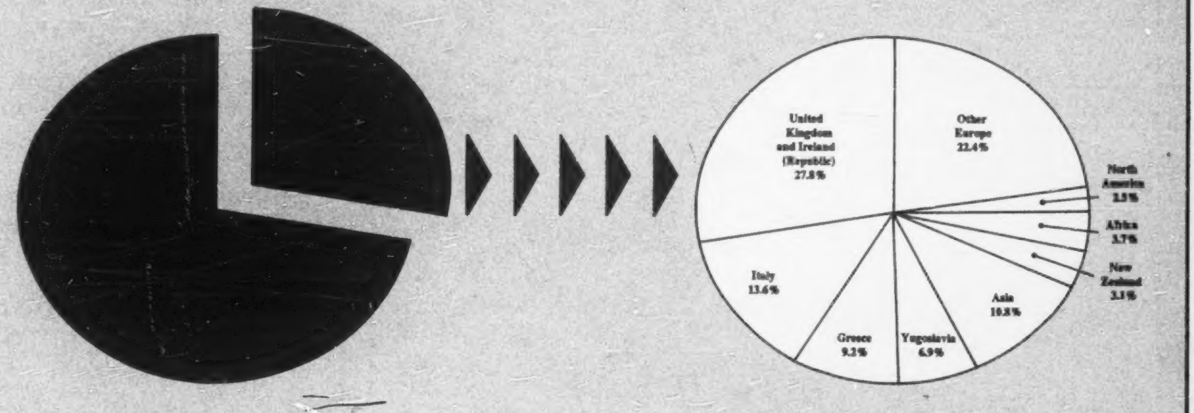
# INTERNATIONAL DEMOGRAPHICS

CONSUMER ■ TRENDS ■ AND ■ MARKETS ■ ABROAD

MARCH 1986 VOLUME 5, NUMBER 3

Melbourne's immigrants: Where they come from



AREA PROFILE

# Greater Melbourne

Pubs, rugby matches, Yorkshire pudding, cockney idioms--Melbourne has them all. But with more than one-fourth of its residents born overseas, it is rapidly changing from an all-white outpost of Britain to a multicultural, multilingual community rivaling any of the world's immigrant cities.

What transformed Melbourne was Australia's abandonment of its "white Australia policy" after World War II. In the last 25 years, 3 million immigrants from 100 different countries have come to Australia, the majority settling in Melbourne ~~and Sydney~~. The bulk of Melbourne's newcomers hail from New Zealand, Rhodesia, South Africa, Britain, Ireland, Greece, Turkey, Italy, Yugoslavia, Poland, and Indochina.

In recent years, Melbourne's polyglot, multicultural flavor has been encouraged by Australia's official attitude of integrating rather than assimilating immigrants. Immigrant groups are encouraged to maintain their languages and cultures while becoming part of Australia. Melbourne's 40 Greek Orthodox churches, 3 mosques, and streets lined with Vietnamese and Chinese restaurants hint at how well Melbourne has contributed to the new Australian ethos of tolerance for, and pride in, ethnic diversity.

Melbourne is Australia's second largest city and is in constant competition with Sydney for cultural, economic, and political dominance of the nation. Built on the shores of Port Phillip Bay, the city enjoys a mild but changeable climate which helps shape a lifestyle oriented to gardening, sport, and outdoor activity.

One out of five Australians calls Melbourne home. Located in the State of Victoria, Melbourne had a

*continued*

## INSIDE

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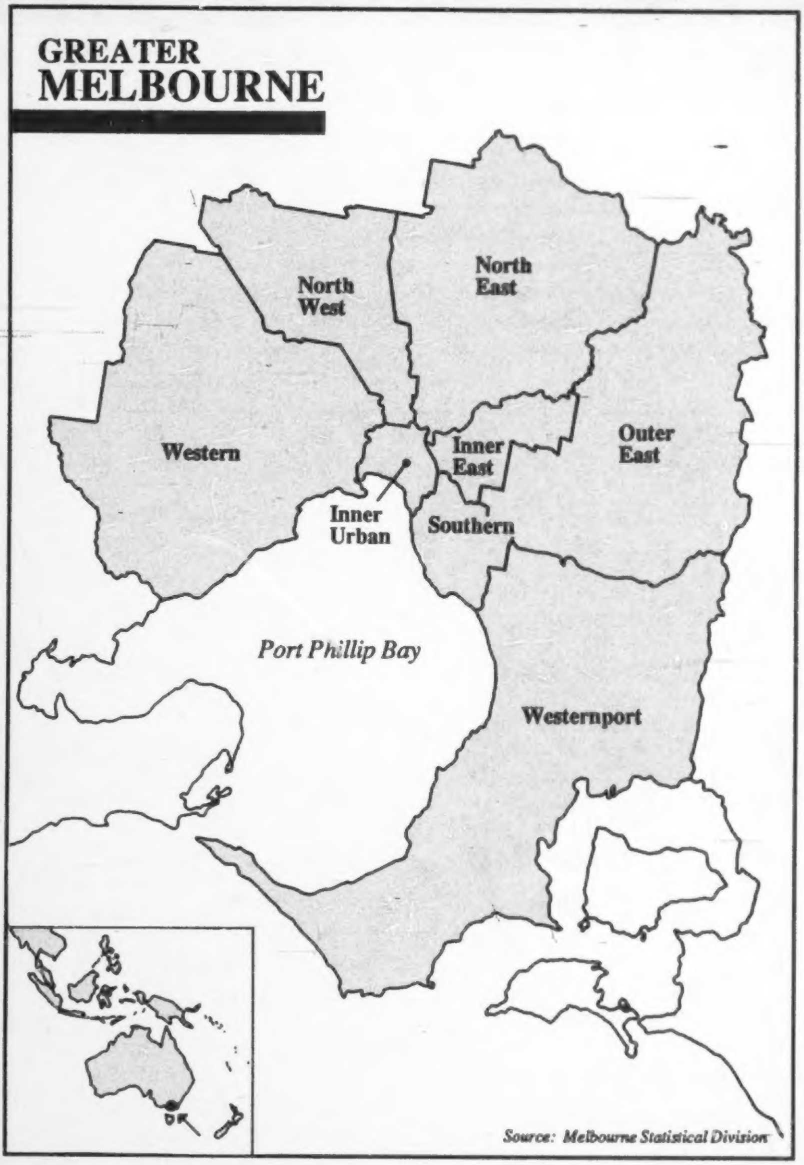
THIS MONTH: MELBOURNE



*Source: Melbourne Statistical Division*

population of 2,888,400 in 1984. It was first occupied by British colonists in the 1830s, and in the 19th century was one of the world's most rapidly growing cities, expanding from a population of 300 in 1837 to 535,000 in 1900. Growth in the 20th century has been more subdued, although one particular component of Melbourne's growth--overseas migration--remains dominant to this day.

One of the characteristics of 19th-century Melbourne that continued unchanged until recently was the process of extending and filling in the metropolitan area by uncontrolled speculative subdivision. The subdivision process, reinforced by households' preference for detached dwellings--75 percent of Melbourne's population currently lives in detached houses--has created a sprawling, low-density city that rivals or exceeds the physical area of cities with two or three times its population. In the last few years, however, the Victorian government has made a concerted effort to control Melbourne's sprawl. Future growth is to be channelled into corridors or concentrated in and around designated district centers within the existing urban area.

The State of Victoria's only urban center of more than 1 million people, Melbourne accounted for nearly 72 percent of Victoria's population in 1984 with an average population density of 150 persons per square kilometer. The next largest urban area, Geelong, has a population of just over 100,000 and accounts for only 3.3 percent of Victoria's population.

### POPULATION GROWTH

From World War II until the early 1970s, economic conditions improved greatly and population growth for both Australia and Melbourne accelerated substantially. Over this period, Melbourne's growth paralleled that of many American cities. In the "new" Melbourne, population doubled and suburbanization continued unchecked, facilitated by the increased use of the private motor vehicle. As a result, by 1981, 55 percent of the population lived in the outer suburban regions of Melbourne, compared with only 12 percent in 1947. Conversely, the inner-city population fell from 28 percent to just 9 percent of the total.

Between 1954 and 1961, the population of Melbourne grew at an average annual rate of 3.5 percent, fueled largely by an energetic overseas immigration program. Growth slowed somewhat from 1961 to 1971 but still averaged 2.5 percent annually. These two periods saw one

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of the greatest expansions of Melbourne since the 1880s.

From 1971, however, Melbourne's population growth slowed substantially as the combined result of lowered fertility, reduced immigration, outward internal migration, and a contraction in economic growth. Between 1971 and 1976, the annual growth rate averaged 1.4 percent, dropping to only 0.6 percent for the 1971-76 interval--the lowest rate since the 1890s depression and the lowest of any large Australian urban area.

Since 1966, both Sydney and Melbourne have lost population to the rest of Australia through internal migration. However, population in the two cities has continued to climb due to their popularity as destinations for a majority of Australia's immigrants. Between 1976 and 1981, nearly 95 percent of Melbourne's growth came from immigration. Moreover, rural areas around the capital cities absorb much of the internal migration.

### ADMINISTRATIVE STRUCTURE

Metropolitan Melbourne has no government of its own. Instead it has 56 councils with populations ranging from 8,600 people to more than 120,000 people. Given the fragmented local government structure, planning and service provision for Melbourne is coordinated by a number of statutory authorities with few important urban functions left to local government. Strategic planning, education, health and welfare, housing, utilities, police, fire, and ambulance services are all provided at the state rather than municipal level. Local government takes care of waste disposal, road maintenance, and parks and gardens. The state employs 170,000 in Melbourne while local government employs only about 19,000.

To facilitate planning and services, the Melbourne metropolitan area is divided into eight regions, with a number of services including education, health, and some welfare and housing provided on a regional basis.

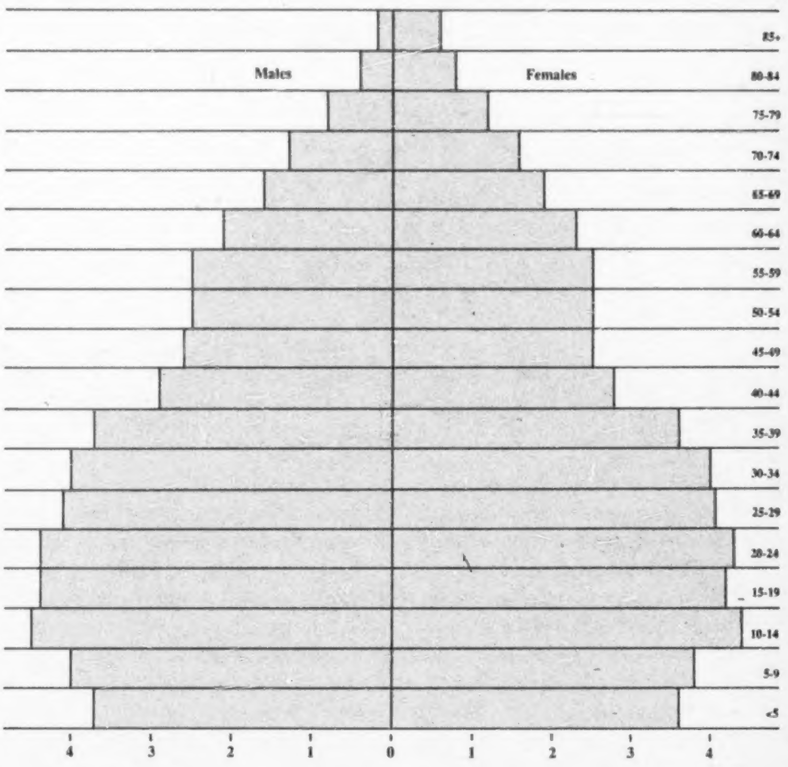
The largest region is the Western, with about 400,000 people. The smallest is the North West, with about 220,000 people.

As in all large cities, economic and demographic characteristics and lifestyle amenities vary from region to region. First, although having suffered population loss, the Inner Urban area has not decayed but rather offers a thriving and diverse environment for newly arrived migrants, working-class households, and professional (often childless) households.

Second, while some regions are

**Population of the State of Victoria by age and sex: 1983** *(in percent)*

Melbourne is home to about 72 percent of Victoria's population



| *Age Group* | *Total* | *Male* | *Female* |
|---|---|---|---|
| 0-4 | 294,200 | 150,207 | 143,993 |
| 5-9 | 310,891 | 159,512 | 151,379 |
| 10-14 | 360,514 | 183,483 | 177,031 |
| 15-19 | 345,648 | 176,996 | 168,652 |
| 20-24 | 352,675 | 177,886 | 174,789 |
| 25-29 | 330,023 | 165,484 | 164,539 |
| 30-34 | 321,549 | 161,036 | 160,513 |
| 35-39 | 295,596 | 149,174 | 146,422 |
| 40-44 | 232,907 | 119,021 | 113,886 |
| 45-49 | 202,705 | 102,969 | 99,736 |
| 50-54 | 201,619 | 102,615 | 99,004 |
| 55-59 | 201,959 | 101,341 | 100,618 |
| 60-64 | 174,078 | 83,043 | 91,035 |
| 65-69 | 141,229 | 64,844 | 76,385 |
| 70-74 | 115,618 | 50,485 | 65,133 |
| 75-79 | 77,743 | 30,995 | 46,748 |
| 80-84 | 45,694 | 15,597 | 30,097 |
| 85 and over | 29,984 | 7,659 | 22,325 |
| All ages | 4,034,632 | 2,002,347 | 2,032,285 |

## Melbourne's regions, selected indices

| Region | Population 1981 | % Married couples with children 1981 | % Overseas born 1981 | % Males' incomes greater than $26,000 1981 | % Tertiary qualified 1981 | % unemployed persons 1981 | % Owner occupiers 1981 |
|---|---|---|---|---|---|---|---|
| Inner East | 406,772 | 37.9 | 21.5 | 9.7 | 15.4 | 3.5 | 78.0 |
| Inner Urban | 245,019 | 17.3 | 32.8 | 5.1 | 12.9 | 8.4 | 36.8 |
| North East | 351,319 | 41.0 | 25.2 | 2.9 | 7.2 | 5.4 | 73.6 |
| North West | 228,737 | 40.1 | 31.8 | 1.5 | 4.6 | 6.3 | 71.3 |
| Outer East | 372,366 | 45.7 | 21.6 | 3.8 | 8.8 | 4.5 | 83.5 |
| Southern | 359,296 | 27.3 | 25.7 | 5.9 | 11.2 | 4.3 | 69.8 |
| Western | 407,447 | 42.4 | 31.9 | 1.6 | 4.7 | 6.5 | 73.0 |
| Westernport | 406,447 | 41.8 | 25.1 | 2.6 | 5.5 | 5.6 | 75.9 |

## Resident population growth in Victoria: 1978-1983

| Year | Rate of Natural Increase | Total Number of People | Rate of Net Overseas Migration | Total Number of People Net | Rate of Interstate Migration | Total Number of People Net | Rate of Migration Gain | Total Number of People | Rate of Total Population Growth |
|---|---|---|---|---|---|---|---|---|---|
| 1978 | 0.78 | 30,021 | 0.47 | 18,068 | −0.29 | −11,000 | 0.18 | 7,068 | 0.69 |
| 1979 | 0.74 | 28,483 | 0.41 | 15,874 | −0.28 | −11,000 | 0.13 | 4,874 | 0.59 |
| 1980 | 0.74 | 28,843 | 0.54 | 20,932 | −0.28 | −11,000 | 0.26 | 9,932 | 0.72 |
| 1981 | 0.74 | 28,960 | 0.74 | 29,052 | −0.39 | −15,398 | 0.35 | 13,654 | 0.83 |
| 1982 | 0.77 | 30,346 | 0.79 | 31,374 | −0.37 | −14,515 | 0.43 | 16,859 | 1.20 |
| 1983 | 0.73 | 29,334 | 0.43 | 17,107 | −0.15 | −5,931 | 0.28 | 11,176 | 1.02 |

**Discrepancies between the sum of natural increase, net migration rates, and the rates of total growth are due to intercensal adjustment.*

dominated by working-class households and have inferior amenities and services, and others are dominated by white-collar households with better amenities and services, the degree of class segregation is not as marked as in many other world cities.

In broad terms, however, the Inner East region is the most affluent and best serviced and the Western and Inner Urban regions, the least affluent, although the latter has a wide range of amenities and services.

### IMMIGRATION AND ETHNICITY

A vigorous immigration program in the postwar years helped transform Melbourne from a predominantly Anglo-Saxon community to a truly international city reflecting the presence and contribution of its many overseas-born residents.

According to the 1981 census, 28 percent of the Melbourne population was born overseas. When first and second generation Australians are included, less than half the total population of Melbourne was born in Australia of Australian-born parents. Immigrants not only contribute to the labor force, but they bring to Melbourne a diversity of lifestyles and culture, foods and leisure activities.

Of the overseas-born in Melbourne, the largest group are from the United Kingdom and Ireland (27.8 percent), reflecting the traditional ties with the British Commonwealth. From non-English speaking countries, the largest single national group is the Italians, accounting for 13.6 percent of Melbourne's overseas-born population; the city hosts nearly twice as many Italians as Sydney. Firms catering primarily to the Italian community abound: builders, funeral parlors, law firms, supermarkets, clothing stores, and the ubiquitous Italian restaurant.

Melbourne's second largest non-English speaking immigrant group is the Greek community. About 69,000 Melbourne residents were born in Greece. In fact, Melbourne is the third largest Greek city in the world (counting only those people born in Greece), surpassed only by the Grecian cities of Athens and Thessalonika.

The third largest non-English speaking group are the Yugoslavs (51,000). Other important ethnic groups include the Lebanese, Turks, Dutch, and Germans.

In recent years, there has been a marked increase in immigration from Southeast Asia, reflecting the response of the Australian government to the plight of refugees fleeing Vietnam and Kampuchea. By establishing an immigration category for refugees, the Australian government has placed humanitarian aims on equal footing with other immigration criteria such as family reunion and labor market contributions.

Each immigrant group develops its own neighborhoods, although overall segregation of new immigrants is low by international standards. Historically, the first stop for immigrants has been the Inner Urban region, or one of the migrant hostels in the Inner East, Western, and Westernport regions. While the hostel accommodation is only temporary, immigrants tend to find employment and housing in suburbs around the migrant hostels. This trend facilitates the dispersal of immigrant communities throughout Melbourne's regions. Italian and Greek communities are disproportionately located in the Inner Urban, Western, and North West regions; British, Irish, German, and Dutch in the Westernport and Outer East regions; and Indochinese in the Inner East, Outer East, and Westernport regions.

In contrast to the North American experience, ethnic immigration has not led to the decline of the inner-city area but rather to its health.

### FERTILITY

Compared to the rest of the developed world, Australia's and Melbourne's current level of fertility is high, reflecting its younger age structure than that characteristic of countries such as Japan, Canada, and the

United States. Fertility is, however, on the decline. The total fertility rate (the total number of children an average woman will bear in her lifetime) for Victoria, which includes Melbourne, fell from 1.82 in 1983 to 1.79 in 1984.

Although age-specific birthrates have generally declined since the 1950s, the birthrate for women aged 30 to 34 has increased since the mid-1970s. By 1984, the birthrate for women aged 30 to 34 (8.7 births per 1,000) was higher than for women aged 20 to 24 (8.2 per 1,000). The highest birthrates (between 20 and 24 live births per 1,000 population) are found in the outer-suburban areas of Melbourne while the lowest birthrates are found in the older, established suburbs in the Inner Urban region and Inner East region (around 9 live births per 1,000 population). Victoria's birthrate in 1982 was 15.0 compared with 15.8 for all of Australia.

## AGE STRUCTURE

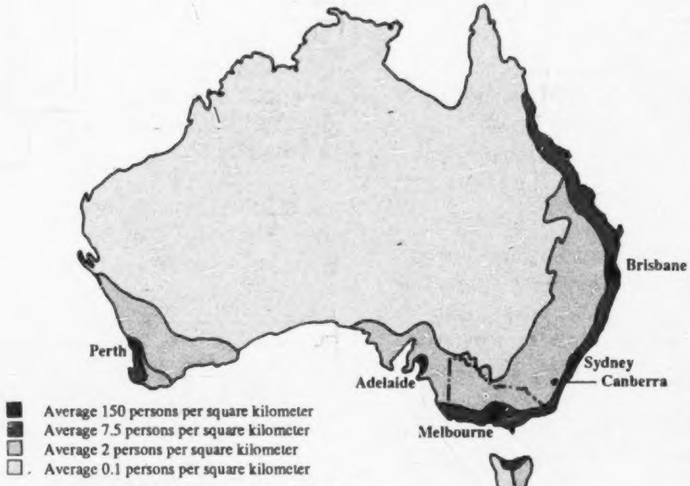
Melbourne's age structure reflects the different contributions of fertility and overseas migration. Compared with most advanced cities in the West, there is a greater percentage of population in younger age brackets. In 1981, 41 percent of Melbourne's population was under age 24; twenty-six percent was under age 14. However, there is, in line with trends in similar world cities, an increasingly aging population, in part because of the aging of large numbers of immigrants who came in the 1950s, and in part because of the decline in fertility since the 1970s. In 1981, 9 percent of Melbourne's population was over age 65. By the year 2001, 11.4 percent of the Melbourne population will be over age 65, while the share of those under age 14 should fall to 23 percent.

Younger age groups are disproportionately represented in the postwar suburban regions and those over age 65 in the more established Southern, Inner Urban, and Inner East regions. These regions, however, disguise some significant departures from this pattern. Some

**Australia and the Province of Victoria**

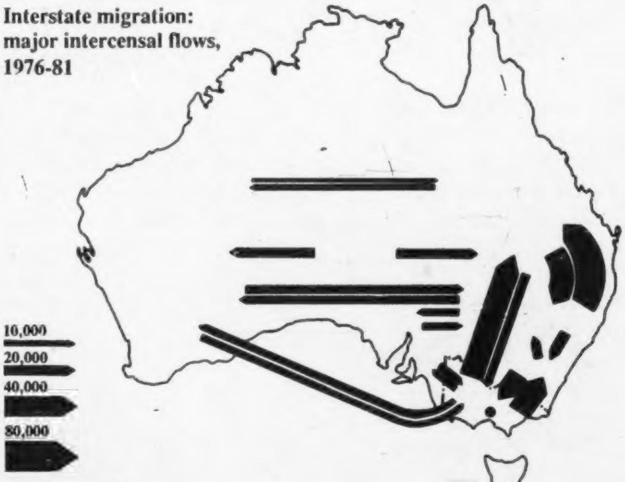
Gulf of Carpentaria
Pacific Ocean
Indian Ocean
Great Australian Bight
V TORIA
Albury
Ball
urne
Geelong
Tasman Sea

**Settlement zones, 1981**


Brisbane
Perth
Sydney
Canberra
Adelaide
Melbourne
Average 150 persons per square kilometer
Average 7.5 persons per square kilometer
Average 2 persons per square kilometer
Average 0.1 persons per square kilometer

*Sources: DIEA & Division of National Mapping*

**Interstate migration: major intercensal flows, 1976-81**


10,000
20,000
40,000
80,000

*Source: ABS*

## TIPS ON TRADE

### China survey

**Survey Research Group (SRG), a New-York based international market research company, will conduct its second Omnibus survey in China this April and May. This survey, which will interview a representative sample of 1000 adults residing in the Shanghai area, follows the completion of SRG's first China Omnibus conducted in Beijing and Ghangzhou in 1985.**

**SRG's first Omnibus survey in China includes data on media exposure as well as brand awareness, ownership, and purchase intention for such products as motorcycles, electric fans, rice cookers, refrigerators, sewing machines, cameras, radios, and televisions.**

**Data was collected by Survey Research Hongkong through interviews with 1000 adults aged 15 and over in Guangzhou and 1000 adults in Beijing. Over a dozen central location tests, group discussions, and door-to-door surveys were conducted.**

**For further information on either of the SRG China Omnibus surveys, contact Jerry Stafford at NFO/SRG International, Ltd., 56 Lafayette Avenue, North White Plains, NY 10603; telephone (914) 948-5100.**

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beach-side municipalities in the outer-suburban Westernport region have high concentrations of the elderly, having been attracted largely to seaside retirement living.

#### HOUSEHOLDS

Over the past decade, single-person households in Melbourne have grown faster than any other household type, accounting for nearly 24 percent of all households in 1981. The number of lone-parent households also has grown quickly, to 6 percent of all households in 1981. On the other hand, the stereotypical nuclear household of married couple and children has grown slowly, and by 1981 represented only 37 percent of all households.

Single-person households tend to be at both ends of the age spectrum, with many elderly single-person households resulting from the death of partners, but with a substantial number of young, never-married, single-person households as well.

Lone-parenthood may be an increasingly fleeting experience for Melbourne's divorced; remarriage in Victoria is on the rise. In 1984, remarriages accounted for 31 percent of all marriages, up from 15 percent in 1974.

The growing diversity of Melbourne's household structure presents a challenge to current housing and planning policy. There is a need for more medium-density housing such as townhouses and apartments. The other significant aspect with regard to Melbourne's households is that the two most rapidly growing household types--lone parents and singles--usually have lower incomes, suggesting a polarization of incomes between established family types and newly formed households.

COMPARATIVELY SPEAKING

*An average square kilometer in Melbourne houses 150 people; in Tokyo, 5436.*

COMPARATIVELY SPEAKING

The Inner Urban region has the highest number of nontraditional households with only 17 percent of its households containing two parents and children. Two of the outlying regions--Outer East and Western--have the greatest proportion of married couples, 46 percent and 41 percent, respectively.

#### HOUSING

In 1976, a visiting British housing authority remarked, "Australians are among the best-housed people in the world, and they are also perhaps the most equally housed." Melbourne's housing testifies to this statement.

In metropolitan Melbourne, 71 percent of all households are owner-occupied and, with the exception of the Inner Urban region where only 37 percent of dwellings are owner-occupied, there are few regional differences in the proportion of ownership. The median-sized dwelling in Melbourne in 1981 had 5.2 rooms; again with the exception of the Inner Urban region, little difference is found among the regions. The most affluent region is the Inner East with 5.5 rooms per dwelling. Thus, with an average occupancy of 0.6 people per room, overcrowding is virtually unknown. Nearly all dwellings have running water, internal flush toilets, and electricity.

The homogeneity of dwelling types in Melbourne offers little choice to Melbourne homeowners. Over three-quarters of all dwellings are detached, with another quarter a mixture of terraced housing and low-rise and high-rise apartments.

Nearly all the high-rise flats are located in the Inner Urban region, the bulk being publicly owned, although recent years have seen a spate of high-rise luxury apartments within close proximity to the central business district.

The majority of terraced houses and low-rise flats are also in the Inner Urban area with some spillover to neighboring municipalities in the Inner East, Southern, and North West regions. The homogeneity of housing is most pronounced in the Outer East region where 92 percent of dwellings are detached houses, although six of the eight regions have detached dwellings as more than 80 percent of their stock.

Private rental units, contrary to the experience of many countries, have remained remarkably resilient over recent decades, accounting for about 20 percent of all occupied housing. Regional variations, however, abound. In the Inner Urban region, 44 percent of the dwellings are privately rented; in the Southern region, 22 percent; and in the Outer East region, only 11.5 percent. The absence of rent control and capital gains tax on the sale of property, combined with landlord-tenant legislation that until recently favored landlords, has made private rentals attractive for landlords.

In 1981, public housing accounted for only 2.6 percent of all dwellings due largely to government policy between the 1950s and the 1970s which led to the sale of more than half of all public-housing stock. A disproportionate share (nearly 41 percent) of public housing is concentrated in the Inner Urban area.

Unlike the United Kingdom where public-housing tenants are encouraged to purchase, the Victorian government has largely ceased the sale of public housing and embarked on a program to significantly expand the public-housing sector. This policy recognizes the difficulties that the sale of public housing and consequent stock reduction created for the growing number of lower-income households, among which lone-parent families figure prominently. New public housing in Victoria rivals or betters that of the private sector.

House prices have risen in the last decade with the median-priced house in Melbourne in 1983 worth about $US 66,600, just over four times the yearly earnings of the average Melbourne resident.

Regional variations in dwelling-price increases have been far from uniform with housing prices rising fastest in the Inner Urban, Inner East, and Southern regions. Housing prices in Fitzroy, an Inner Urban suburb, for example, soared 17 percent annually between 1971 and 1983, while in Footscray, a suburb in the Western region, prices only climbed 9 percent annually.

Rising prices have tightened the housing market for middle-income families. In 1971, a household of one breadwinner with average earnings could afford the mean-priced house in 46 of the 56 municipalities in Melbourne. By 1983, that same household could afford the mean-priced house in only five municipalities. Whether this means that Melbourne will become more income and class segregated remains to be seen.

EDUCATION

Education is largely the responsibility of state governments in Australia. Formal education is divided into four sectors: schools (primary and secondary levels), technical and further education (TAFE), colleges of advanced education (CAEs), and universities.

At the primary and secondary levels, there are a number of private schools, run either by the Catholic Church or other nongovernment groups. In 1982, there were 493 Roman Catholic schools in the State of Victoria.

About three-quarters of primary school students attend public schools, while the remainder attend private (mainly Catholic) schools. In 1982, almost a half million children attended Victoria's primary schools. At the secondary level, where schooling is compulsory only until age 15, the proportion attending private school increases to nearly a third of all students. High schoolers in the State of Victoria totaled 341,410 in 1982.

Demographic projections prepared by the Australian Bureau of Statistics show primary school enrollments in Melbourne declining until the late 1980s and then beginning to increase again. Secondary school enrollments are more difficult to project because they are dependent, among other factors, on students' perceptions of employment opportunities. High school graduates are fewer in

## TIPS ON TRENDS

### Sterilization on the rise in Britain

**Three-quarters of all British women aged 18 to 44 used some form of contraception in 1983, according to Britain's recently published 1983 Report of the General Household Survey (GHS), which included for the first time data on contraception. Oral contraceptives were preferred by 28 percent of women in this age group and by more than half of women aged 20 to 24. Use of oral contraception declines with age however, the report states: only 4 percent of 40-to-44-year-olds took the pill in 1983.**

**Comparing current GHS results to earlier surveys shows sterilization for birth control increasing steadily since 1970. Overall, 22 percent of women aged 18 to 44 had been sterilized or were living with a sterilized partner in 1983, although virtually none under 25 opted for this method.**

**From 1970 to 1983, the percentage of married or formerly married women from 16 to 39 who were sterilized or had a sterilized partner rose sharply from 4 percent to 24 percent. The period from 1976 to 1983 saw increased sterilization limited to the 30-to-44 age group. Men were as likely as women to be sterilized when only one partner was so classified.**

**The survey also shows that in 1983, 35 percent of women cohabitated before marriage. Further, if today's rising divorce rate is maintained, one in four couples will divorce before their fifteenth anniversary. The increasing divorce rate also was reported by another annual government survey, Social Trends (ST), issued in early 1986. According to ST, 130,000 women and 49,000 men filed for divorce in 1984.**

**Another GHS finding shows decreased family size. In 1982, family size was 2.64 per household compared with 2.91 per household in 1971. Over the same period, persons living alone rose sharply from 6 percent to 23 percent of the total population. One-parent families also were up, from 5 percent to 13 percent of the total.**

***--Peter Inserra***

FEATURE

## APASCO provides special marketing services "Down Under"

Most firms in the United States take advantage of the detailed manipulation of census and zip code data by private firms. Firms listed in the annual American Demographics Directory of Data Companies provide data for almost any configuration of geography, and many have demographers on staff who update numbers during the census interval.

Australia has at least one company that provides full service data manipulation and mapping similar to that available in the United States.

APASCO, with offices in North Sydney and Melbourne, provides demographic and mapping information in four ways.

--You can buy a computer terminal and obtain direct access to their systems 24 hours a day (probably the least likely solution for a firm based in the United States).

--You can buy a ready-made product or a special tabulation "over the counter" through a letter, a meeting with the company, or by telephone.

--You can buy consulting services that will include analytical and interpretive services as well as reports. This may be a useful route for firms not familiar with cultural differences in Australia.

--Or you can send someone to work at the APASCO computing center and receive consultation from their staff at the same time.

Typical uses of APASCO's databases are for selecting and setting up sales or distribution territories in Australia. Databases are used to target more effectively for media buying, advertising, and direct marketing. They are used to improve sales management performance and market planning and forecasting--exactly the same kinds of applications for which U. S. firms use U. S. data companies.

To target markets for direct mail, for example, APASCO can rank all postcodes (equivalent of our zip codes) in a region in descending order of incidence in the market you are trying to reach. If, for example, you are trying to target households with high school students, APASCO would tell you which postcodes in which regions contain the most prospects. If you wanted it, APASCO could then provide you with a color map of those postcodes, a helpful tool when trying to make people in your organization understand the strategy you are considering. Maps of Australian postcodes for each region are also available from APASCO without any additional data.

Just as U. S. companies have created products that provide total market estimates and indexes of buying power for specific consumer goods and services, so has APASCO.

We found APASCO's *Product and Service Manual* and their product brochures clearly illustrated and written--no language barriers were apparent, either from industry jargon or simply a different brand of English. Descriptions of products are clear, and examples of report formats and applications are given in each case.

For more information about APASCO's products and services, contact Mitchell Burman or Tony Buxton at APASCO, 5th Floor, 56 Berry Street, North Sydney, NSW 2060, Australia; telephone (02) 922-2088.

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Australia than in other modernized countries, with girls more likely to complete high school than boys. In 1982, 39.5 percent of young women finished high school, while only 29.4 percent of young men did so.

Higher education is the fastest-growing type of education in Melbourne, but not because of interest from new high school graduates. Melbourne hosts 14 colleges of advanced education, three universities, and 19 TAFE colleges. Two more TAFEs will open soon in the city. There are no fees for tertiary education in Australia, and a universal means-tested student allowance is provided.

Even so, higher education is not as popular with new high school graduates as in other countries. In 1982, only 46 percent of new high school graduates went to college, compared with 56 percent in 1976. Reflecting in part this decline, the demographic profile of students in higher education is changing, with a declining proportion of full-time students and an increasing proportion of more mature (aged 21 to 64), part-time students. Thus, overall, the proportion of the Melbourne population with any form of post-secondary school qualifications is increasing: in 1969, only 18 percent of Melbourne's adult population had post-secondary qualifications, while in 1982, this figure had jumped to 41 percent.

University and CAE qualifications correlate highly in Melbourne with socioeconomic status, and the share of population with such qualifications varies from a high of 15 percent in the affluent Inner East region to less than 5 percent in the Western and North West regions of the city. There is little variation, however, in the proportion of foreign-born and Australian-born participation in higher education with all participating at about the same level--27 percent. This is another reason why Melbourne is seen as a city of opportunity for many overseas-born migrants.

### TRANSPORT

Melbourne's suburban sprawl promotes a dependence on private cars even though public transit is good compared with many North American cities of similar size. The Ministry of Transport's 1978-79 survey of metropolitan travel behavior found that nearly two-thirds of all trips in Melbourne were by private car, while 13 percent were by public transport. Inner-region residents traveled slightly more often by public transport.

The spread of industry to the outer suburbs marked a change from the period prior to the mid-1950s when most workplaces, blue- or white-collar, were accessible by public transport. For an increasing proportion of the noncentral business-district work force, public transport was not a feasible alternative to the car, given the failure to extend the tram and train network in the postwar period of suburban development. Since the war, the most significant additions have been new freeways.

COMPARATIVELY SPEAKING

***The average Australian drinks over twice as much wine and about a third more beer than the average American.***

COMPARATIVELY SPEAKING

**RETAILING AND RESTAURANTS**

Melbourne has an impressive array of retailers. In 1980, more than 28,000 retail establishments, along with some 4,200 cafes, restaurants, and hotels dotted the city. Melbourne's retail industry combines elements of both North American and European traditions. The last two decades have seen the introduction of about a dozen free-standing regional shopping centers of the type found in suburban North America. These have emerged simultaneously with a resurgence of growth of suburban strip-shopping centers and new investment in central business retail areas.

To survive, the strip-shopping centers have modernized and diversified to include more food establishments and clothing boutiques. This diversity has been encouraged by the multicultural nature of Melbourne--many stores cater to particular ethnic groups--and shop trading hours which effectively prevent large chains and multinationals from driving out the small family business. Most retail premises can open only between 9 a.m. and 5:30 p.m. on weekdays (extended to 9 p.m. on Fridays) and until 12:30 p.m. on Saturdays. Retail trading on Saturday afternoons and evenings and on Sundays is prohibited.

Restaurant dining is an important part of the lifestyle of Melbournians, a fact reflected in the huge number of restaurants. Again, elements of the European and North American traditions combine, but are overlaid with some uniquely Melbourne characteristics. There are large numbers of the North American type fast-food restaurants, but they are outnumbered by typical European-type bistros, supplemented by substantial numbers of Chinese, Indochinese, Malaysian, and Indian cafes. Despite the great diversity, most restaurants share a Melbournian characteristic--the right of customers to bring their own alcohol to a restaurant and drink it on the premises. The number of BYO (Bring Your Own) restaurants exceed those licensed to sell alcohol.

The preference of many Melbourne residents for recreation outside the home explains the large number of cinemas in Melbourne, despite VCR ownership by 40 percent of households. In the early 1980s, there were more than 120 cinemas in Melbourne, and a number of new ones are being built.

**LABOR FORCE**

Melbourne, like most large cities, has restructured industrially in the last decade. Manufacturing industry, which accounted for more than 30 percent of employment in the 1960s, has declined rapidly and now accounts for about 24 percent of employment. Conversely, service industries (finance and insurance, public administration, sales and community services) continue to expand. In 1981, the service sector accounted for about 30 percent of employment.

Compared to other Australian cities, Melbourne's industrial base has historically centered around and been dependent on manufacturing. Motor vehicle manufacture and clothing and footware were two of Melbourne's largest industries: both were severely affected by the world recession following the 1973 energy crisis. As a result, the increase in unemployment in Melbourne was greater than in most other cities in Australia, peaking at just under 10 percent in the early 1980s.

Melbourne has staged a minor industrial renaissance, however, with growth in several industrial sectors. By 1985, Melbourne's unemployment rate was the lowest of any capital city in Australia, about 6 percent. Particularly important to this growth has been the building and constuction industry where expansion in residential construction has been paralleled with a number of large-scale commercial developments.

**SOURCES**

The Australian Bureau of Statistics has an office in each capital city. In addition to a census every five years, Victoria collects important social, demographic, and economic information throughout the year and compiles statistical summaries in printed format. They are also available on computer printout, magnetic tape, and microfiche.

The Melbourne office has a reference library open to the public as well as an Information Services Section (telephone 03 63 0181), which handles inquiries. Further information on statistical information for Melbourne is available from the Melbourne office of the Australian Bureau of Statistics by writing to: Deputy Commonwealth Statistician, Attn. Information Services, G.P.O. Box 2796Y, Melbourne 3001, Australia.

The most important sources used in this profile were *Melbourne...a Social Atlas*, produced by the Division of National Mapping and

*continued on p. 12*

# *REGIONS*

## *SOUTH AMERICA*

### Brazil

Considering Brazil's per capita income, school attendance is low. In 1980, fewer than a third of 12-to-15-year-olds attended secondary school, compared with more than half in Malaysia and more than five-sixths in Korea, both countries with lower per capita incomes than Brazil's.

Brazil's wider income gap between rich and poor may be the cause. Thirty percent of Brazilian households account for only 4 to 6 percent of total income; the top ten percent of households, 41 to 50 percent.

Most Brazilian children begin school but drop out after two or three years. In the urban south--Brazil's wealthiest region--the average child will have attended school for only 4.5 years by the time he or she is a teenager and in the poor northeast region, a mere 0.7 years.

In the poorest area, only a third of the children from the area's poorest families attended school in 1980 while nine-tenths of the richest children in this region did. However, poor children in rich areas fared much better, staying in school longer than the poor in poor areas. Up to two-thirds of poor children in the wealthy south, for example, were enrolled in school. Schools in richer areas with better facilities and teachers appear to encourage children to remain in school.

These findings from a recent World Bank study suggest that Brazil may gain more productivity by improving the quality of a small number of schools so that students who start school will stay longer rather than expanding the number of its schools.

## *AFRICA*

### Kenya

Kenya's population rate of 4 percent a year is the highest in the world. At this rate of increase, Kenya's population of 17 million will double in the next 17 years.

Population growth rates in Kenya's urban centers are even higher. The Kenyan capital, Nairobi, is increasing at the rate of 8 percent a year. By the year 2000, its current population of 1.2 million people will swell to 3 million.

In 1980, Kenya's urban population accounted for only 15 percent of the total. By the year 2000, 30 percent of the total population will be urbanized.

To offset Kenya's rapid population growth, the government is urging couples to have no more than four children. Civil service workers with more than four children are no longer eligible for maternity leaves. Likewise, special fees are being levied on families of civil service workers for any extra children attending public school.

Kenya's National Council for Population Development, which had traditionally concentrated on reaching women through maternal and child health services, is taking a new approach--over-the-counter family planning services. This attempt to increase family planning acceptance uses male shopkeepers-- who already serve the community by distributing drugs--to dispense contraceptives. The sale of contraceptives in village shops gives men immediate access to family planning alternatives, an important factor in controlling population in Kenya, where men usually have the say in matters of sex and family size.

## *MIDDLE EAST*

### Turkey

For the first time, more Turks live in urban areas than in rural areas, according to preliminary results of the Turkish census held in October 1985. Turkey's urban population has increased eightfold in less than 60 years. Nearly 54 percent of Turkey's 51.4 million people now crowd Turkey's urban areas.

Rapid urbanization also is reflected in the increase in number of cities with more than one million inhabitants from 3 to 11 since 1980. Istanbul's population of 5.5 million people is nearly double of what it was only five years ago.

Preliminary census results came as a surprise to Turkey's State Institute of Statistics, who had underestimated the size of Turkey's total population and its growth rate. Turkey's total population now stands at about 51.4 million with a growth rate of 2.78 percent. This represents a fourfold increase in population in less than 60 years if the 2.5 million Turks living abroad are figured in with census results.

This unexpectedly high growth rate hovers very close to the peak level in the 1955 to 1960 period of 2.85 percent.

## *NORTH AMERICA*

### Canada

Canada's current population of 25 million will increase slowly to 30 million by 2026 and then start to decline, according to Canadian population projections just released by Statistics Canada. This projection is based on a continued total fertility rate of 1.7 lifetime births per woman and net immigration of 50,000 per year.

Another scenario projects Canada's population topping out at 28 million by 2016 due to the total fertility rate falling to 1.4. The possibility of the total fertility rate rising is considered a longshot unless Canadian attitudes toward family size change radically.

These projections, as do all projections, make assumptions about future immigration and life expectancy. Statistics Canada sees life expectancy rising faster for males than females. By 1996, male life expectancy should reach 75; female life expectancy, 82. Immigration should level off at near the 100,000 figure due to family reunification trends and world refugee problems, while 50,000 Canadians are expected to emigrate.

## *ASIA*

### China

China's policy and system reforms have boosted per capita national income 6.8 percent a year from 1979 to 1984, despite relatively rapid population growth. In contrast, from 1952 to 1982, per capita national income growth averaged 4 percent annually.

Per capita national income in developed countries is about ten times that of China's. To catch up by the year 2050, China's per capita income rate will have to remain as high as 5.5 or 6.5 percent while developed countries can coast along at a 2 or 3 percent annual increase.

Maintaining such a fast pace of economic growth is no easy task. From 1960 to 1982 only two developing countries--South Korea (6.6 percent) and Greece (5.2 percent)--sustained such rapid progress (excluding oil-rich and small countries).

**Canada's census families by Province: 1981 to 1985** *(in thousands)*

| | *1981 (census)* | *1982 (estimate)* | *1983 (estimate)* | *1984 (estimate)* | *1985 (estimate)* |
|---|---|---|---|---|---|
| Canada – | 6,309.2 | 6,424.8 | 6,528.1 | 6,629.9 | 6,727.5 |
| Newfoundland | 135.1 | 136.8 | 139.8 | 141.9 | 143.8 |
| Prince Edward Island | 30.2 | 30.6 | 31.1 | 31.6 | 32.2 |
| Nova Scotia | 216.2 | 218.9 | 222.1 | 226.2 | 229.7 |
| New Brunswick | 176.6 | 178.5 | 181.7 | 184.7 | 187.5 |
| Quebec | 1,671.4 | 1,692.6 | 1,710.7 | 1,729.7 | 1,748.5 |
| Ontario | 2,278.8 | 2,316.4 | 2,355.8 | 2,400.9 | 2,445.6 |
| Manitoba | 262.2 | 265.7 | 270.1 | 274.0 | 278.0 |
| Saskatchewan | 245.7 | 249.7 | 254.1 | 259.2 | 262.8 |
| Alberta | 565.5 | 593.1 | 609.3 | 614.6 | 623.5 |
| British Columbia | 727.6 | 742.4 | 753.4 | 767.2 | 775.9 |

[1] *Not including Yukon and Northwest Territories.*
*Note: Each figure refers to June 1 of each year and has been rounded independently to the nearest hundred.*

## CONFERENCES

### Demographics

Seventy-six separate seminars on a wide range of topics of interest to international marketers will be presented by the Population Association of America at its 1986 annual meeting in San Francisco, April 3-5.

Seminar topics include, among many others, temporary international migration, infant mortality in developed societies, population trends in China, declining population in the Western world, women's status and fertility in developing countries, and consequences of demographic change.

For registration materials and a full list of conference seminars, contact the Population Association of America, P.O. Box 14182, Benjamin Franklin Station, Washington, DC 20044; telephone (202) 393-3253.

## COMING UP

**Tokyo:** Japan's populous and complex entrepreneurial powerhouse

**Market research in Europe:** A country-by-country cost comparison

## INSIDE INFORMATION

## Asian marketers, take note

Finally, a monthly advertising magazine from Asia with promise. *Asian Advertising and Marketing* magazine made its debut with its January 1986 issue. Published in Hong Kong by Canadian Roy Howard, this new entry claims "to cover all that's important in advertising and marketing in Asia and beyond."

A tall order for sure, but this new publication makes an initial good go of it. Well-written and beautifully illustrated articles with titles like, "Multinationals think small in Asia's new rural markets," "China embraces the soft sell," and "Pitfalls and problems of advertising in Malaysia" support AA&M's promise to "put the world's fastest growing markets in perspective for the people that are making them grow."

Multinationals think small in Asia's new rural markets

*A two-page spread from a recent issue of Asian Advertising & Marketing*

Other ambitions include publishing news and features from correspondents in every Asian capital (including Beijing) backed up by the latest local, regional, and international research data; analyses of consumer trends and lifestyles; market-by-market reports on such issues as youth and women; interviews with top agency, public relations, and service industry people, and of course with advertisers; creative portfolios of the best TV and print work around the region, and of visible campaigns that are working or not.

AA&M is distributed free to 10,000 advertising and marketing executives throughout the Asian region. Twenty-five percent of these freebies go to marketers in Hong Kong, 15 percent to marketers in Japan, 12 percent to those in Singapore, and 11 percent to those in Thailand. The rest are mailed to Malaysian, Taiwanese, South Korean, Chinese, Fillipino, Indian, Sri Lankan, Pakistani, and Nepalese advertising and marketing executives.

AA&M also is available to subscribers in North America, Europe, Australia, and New Zealand. Annual airmail subscription rates are US $40 for 12 issues, $55 for 24 issues.

For more information, contact United States-based AA&M advertising representatives. The West Coast representative is Scott, Marshall, Sands & McGinley, Inc., 3700 Wilshire Boulevard, Suite 500, Los Angeles, CA 90010; telephone (213) 382-6346. The East Coast representative is McAvoy Advertising & Mktg, Inc., 12 Hickory Hill Lane, P.O. Box 66, Tappan, New York, NY 10983; telephone (914) 365-0858

For subscription information, contact: *Asian Advertising & Marketing*, Attn: Circulation Department, 1801 World Trade Centre, Hong Kong. •

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*continued from p. 9*

the Australian Bureau of Statistics, and *Social Indicators, Victoria*, No. 1, Australian Bureau of Statistics, Melbourne, Australia. (ABS Catalog No. 4101.2). A useful source for overseas readers will be the *1986 Catalog of Publications Australia* (Catalog number 1101.0), available by writing to: Australian Bureau of Statistics, P.O. Box 10, Belconnen 2616 A.C.T., Australia.

Housing information is collected in *Melbourne Housing Indicators*, available from Swinburne Institute Centre for Urban Studies, P. O. Box 218, Hawthorn, Victoria 3122, Australia. •

*--Maryann Wulff, Terry Burke, and Peter Newton*

*Maryann Wulff is a senior lecturer in sociology at the Swinburne Institute for Urban Studies in Melbourne. Terry Burke also lectures at the Swinburne Institute. Peter Newton is an urban geographer with the Commonwealth Scientific and Research Organization in Melbourne.*

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APRIL 1986 VOLUME 5, NUMBER 4

Total Population of the Metropolis of Tokyo by age and sex, 1970 and 1980, in percent

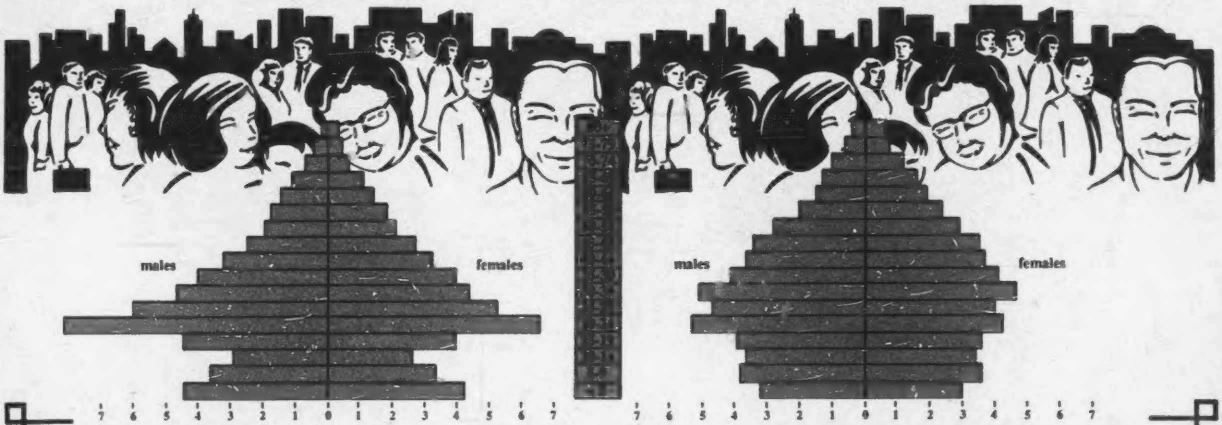

Illustration by Diana Souza

AREA PROFILE

# The Metropolis of Tokyo

In a land noted for its breathless pace, Tokyo leads the nation in almost everything except arable land. No city in Japan has more people, money, power, or influence.

The Tokyo Metropolis alone houses one out of every ten Japanese and a crushing one out of every four when surrounding areas are included. Two million commuters swell its day population jamming railways and connecting subway lines. Tokyo, no wonder, accounts for a high percentage of Japan's income and industrial production.

Tokyo sets the trend for the Japanese. In fashion, enterprise, social attitudes, or lifestyle, as Tokyo goes, so goes the nation.

Japan's voracious reading, listening, and TV-watching appetite is nourished on basically Tokyo fare. Virtually all of Japan's important media originate in Tokyo. The five national newspaper giants--the *Yomiuri* , the world's biggest newspaper with a circulation of 13.6 million, the *Asahi* (12.1 million), the *Mainichi* ( 6.9 million), the *Sankei* (3.1 million), and the *Nihon Keizai* (3 million)--are headquartered in Tokyo. They publish essentially the same newspapers as their Tokyo editions (with a page or two of regional or local news) throughout the nation.

Japan's five major TV stations, all based in Tokyo, produce almost all the TV programs shown on the nation's 99 commercial stations. Programming for Japan's more than 50 radio stations follows Tokyo's lead. Tokyo is also home to Japan's high-quality programming, non-commercial NHK--the world's largest and best-funded public broadcasting station. It is viewed by Japan's nearly 100 percent literate audience as much as all five commercial stations combined.

Almost all books sold by Japan's $3 billion a year book publishing industry and it's 2,500 monthly magazines are published in Tokyo.

With Japanese adults in 1981 on a daily basis reading newspapers on average for 35 minutes, watching TV

*continued*

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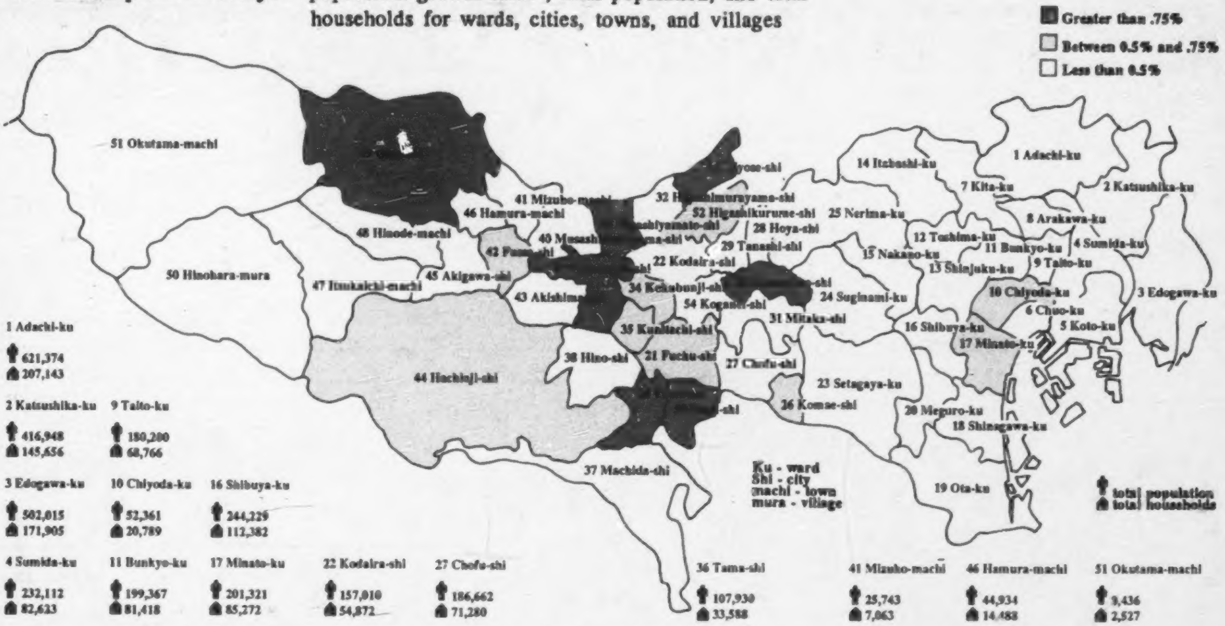
THIS MONTH: TOKYO

## The Metropolis of Tokyo population growth rates*, total population, and total households for wards, cities, towns, and villages


▨ Greater than .75%
☐ Between 0.5% and .75%
☐ Less than 0.5%
51 Okutama-machi
41 Mizuho-machi
46 Hamura-machi
48 Hinode-machi
32 Higashimurayama-shi
52 Higashikurume-shi
28 Hoya-shi
29 Tanashi-shi
22 Kodaira-shi
42 Fussa-shi
45 Akigawa-shi
47 Itsukaichi-machi
50 Hinohara-mura
43 Akishima
34 Kokubunji-shi
54 Koganei-shi
31 Mitaka-shi
35 Kunitachi-shi
38 Hino-shi
21 Fuchu-shi
27 Chofu-shi
44 Hachioji-shi
26 Komae-shi
37 Machida-shi
14 Itabashi-ku
1 Adachi-ku
7 Kita-ku
2 Katsushika-ku
25 Nerima-ku
8 Arakawa-ku
12 Toshima-ku
11 Bunkyo-ku
4 Sumida-ku
15 Nakano-ku
13 Shinjuku-ku
9 Taito-ku
24 Suginami-ku
10 Chiyoda-ku
3 Edogawa-ku
6 Chuo-ku
5 Koto-ku
16 Shibuya-ku
17 Minato-ku
23 Setagaya-ku
20 Meguro-ku
18 Shinagawa-ku
19 Ota-ku
Ku - ward
Shi - city
machi - town
mura - village
total population
total households

| | total population | total households |
|---|---|---|
| 1 Adachi-ku | 621,374 | 207,143 |
| 2 Katsushika-ku | 416,948 | 145,656 |
| 3 Edogawa-ku | 502,015 | 171,905 |
| 4 Sumida-ku | 232,112 | 82,623 |
| 5 Koto-ku | 382,795 | 139,741 |
| 6 Chuo-ku | 80,858 | 31,742 |
| 7 Kita-ku | 373,391 | 146,492 |
| 8 Arakawa-ku | 193,758 | 72,126 |
| 9 Taito-ku | 180,200 | 68,766 |
| 10 Chiyoda-ku | 52,361 | 20,789 |
| 11 Bunkyo-ku | 199,367 | 81,418 |
| 12 Toshima-ku | 284,189 | 129,871 |
| 13 Shinjuku-ku | 342,843 | 158,243 |
| 14 Itabashi-ku | 502,899 | 193,312 |
| 15 Nakano-ku | 343,581 | 157,684 |
| 16 Shibuya-ku | 244,229 | 112,382 |
| 17 Minato-ku | 201,321 | 85,272 |
| 18 Shinagawa-ku | 349,235 | 147,446 |
| 19 Ota-ku | 661,879 | 257,376 |
| 20 Meguro-ku | 272,614 | 118,740 |
| 21 Fuchu-shi | 197,590 | 71,438 |
| 22 Kodaira-shi | 157,010 | 54,872 |
| 23 Setagaya-ku | 807,773 | 342,181 |
| 24 Suginami-ku | 542,322 | 241,095 |
| 25 Nerima-ku | 572,990 | 210,839 |
| 26 Komae-shi | 72,434 | 27,838 |
| 27 Chofu-shi | 186,662 | 71,280 |
| 28 Hoya-shi | 90,916 | 33,291 |
| 29 Tanashi-shi | 68,796 | 24,154 |
| 30 Musashino-shi | 138,606 | 58,736 |
| 31 Mitaka-shi | 165,783 | 66,635 |
| 32 Higashimurayama-shi | 120,802 | 38,401 |
| 33 Higashiyamato-shi | 68,668 | 20,907 |
| 34 Kokubunji-shi | 92,616 | 35,281 |
| 35 Kunitachi-shi | 65,012 | 24,326 |
| 36 Tama-shi | 107,930 | 33,588 |
| 37 Machida-shi | 308,031 | 95,803 |
| 38 Hino-shi | 151,820 | 51,557 |
| 39 Tachikawa-shi | 143,605 | 48,632 |
| 40 Musashimurayama-shi | 59,965 | 18,319 |
| 41 Mizuho-machi | 25,743 | 7,063 |
| 42 Fussa-shi | 49,892 | 17,075 |
| 43 Akishima-shi | 95,047 | 31,798 |
| 44 Hachioji-shi | 413,612 | 130,461 |
| 45 Akigawa-shi | 44,377 | 12,086 |
| 46 Hamura-machi | 44,934 | 14,488 |
| 47 Itsukaichi-machi | 20,616 | 5,586 |
| 48 Hinode-machi | 15,418 | 3,999 |
| 49 Ome-shi | 105,425 | 30,272 |
| 50 Hinohara-mura | 4,174 | 1,150 |
| 51 Okutama-machi | 9,436 | 2,527 |
| 52 Higashikurume-shi | 108,901 | 35,037 |
| 53 Kiyose-shi | 63,881 | 19,972 |
| 54 Koganei-shi | 103,387 | 40,674 |
| 55 Inagi-shi | 49,813 | 15,812 |

**The average growth rate for the Metropolis of Tokyo is 0.5%*

2 hours and 17 minutes, listening to the radio 44 minutes, and reading magazines 41 minutes, Tokyo's enormous persuasive power fosters increasingly homogeneous attitudes and lifestyles in a culture already famous for its deeply rooted sense of conforming to the norm.

Ever since 1868 when Tokyo became the Emperor Meiji's new home and modern Japan's capital, it has been the center of the nation's economic growth and social change. The Information Age with its resultant movement of the workforce away from the industrial sector to the service and retail sector began its transformation of Japan in Tokyo nearly two decades ago. Tokyo's quiet, yet relentless women's revolution coupled with its new breed of Japanese youth has signaled drastic lifestyle and attitude changes for all Japan that older Japanese both bemoan and fear.

### A CHAOTIC CITYSCAPE

All of this conjures up a city of glittering steel-and-glass skyscrapers. Tokyo does have a rapidly high-rising cityscape, especially in its Shinjuku, Shibuya, and Marunouchi sections. But not all of Tokyo is tall and modern. On the contrary, Tokyo's real face--the neighborhoods where millions of Tokyoites live and work--is a chaotic hodge-podge of mostly one-to-six-story dwellings, small shops, and industrial enterprises concentrated in narrow, crowded streets.

Nowhere is Japan's highly industrialized democracy so evident as in its neighborhoods. Low-rise apartment houses stand shoulder to shoulder with more costly detached residences. Gas stations back up to the enclosed gardens of small shrines. As in all Japanese cities, few differences exist in the income or educational level of the residents in the majority of Tokyo neighborhoods.

INTERNATIONAL DEMOGRAPHICS

PUBLISHER: *Doris Walsh* EDITOR: *Denise Rusoff* ART DIRECTOR: *Carol Terrizzi*

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Streets, except for major thoroughfares, twist and turn following centuries-old patterns even though much of the city was destroyed by fire in the Great Kanto Earthquake of 1923 in which more than 700,000 houses burned to the ground. Street addresses are determined by when structures were built rather than their locations, further complicating finding a specific location in back streets.

Crammed between some of the densest housing in the world are the *shotengai*, narrow shopping streets lined with mostly small, specialized, and individually owned Mom-and-Pop stores. Here and there are sprinkled a few supermarkets, superstores, and convenience stores. In Japan, where business comes to the consumer's doorstep, these streets are the scenes of everyday consumer activity.

Tokyo's headlong rush toward commercial success coupled with complicated land-use laws and real estate prices has left many neighborhoods sorely lacking in such social and civic details as parks, playgrounds, and sidewalks. Outlying suburban areas, though less constricted, share these problems.

All this leaves Tokyo neighborhoods cluttered and claustrophobic. With the recent appreciation of the yen and dropping oil prices, however, the Japanese government is calling for increased public-works programs, offering some hope that these conditions will improve.

### POPULATION GROWTH AND DENSITY

As of June 1, 1985, the Tokyo Metropolis reached a record 11,892,016 people, making it,when combined with neighboring Yokohama, the world's largest metropolitan area. Tokyo's population in this century has increased steadily registering significant losses only during the last year of World War II when half its population was either killed by or fled American bombing of the city and during the year of the Great Kanto Earthquake (1923) when an estimated 100,000 people were killed and millions displaced.

By 1952, Tokyo regained the population lost during 1945 and began its steady climb. The first baby-boom between 1947 and 1949 reached child-bearing age in 1971 through 1973 bringing about a second baby boom. Future population changes in Tokyo will be influenced drastically by trends set by these postwar baby-boom generations. As these generations pass through each age bracket, they have a marked economic and social impact.

COMPARATIVELY SPEAKING

***Consumer prices in Japan increased 3.9 percent annually between 1979-1984 as compared to 7.4 percent in the United States.***

Illustration by Diana Sousa

COMPARATIVELY SPEAKING

In recent years, Tokyo's population growth, similar to that of other metropolitan areas in developed countries, slowed due to a fall in the birthrate from a postwar high of 31.5 per thousand in 1947, to 19.9 per thousand in 1972, and 11.4 per thousand in 1983.

The Tokyo Metropolis has 23 wards, 26 cities, 6 towns or villages, and 13 major islands. Tokyo's population divides evenly with roughly 5.9 million males and 5.8 million females. Its nearly 4 and a half million households share 2,160 square kilometers, making Tokyo's population density an average of 5,436 persons per square kilometer.

The lion's share of households (74 percent) exist in the city's wards. Density per square kilometer in the city's wards was a crushing 14,023 persons in 1983. Tokyo's cities, mostly located in outlying areas, fared better with an average of 4,462 persons per square kilometer. Tokyo's villages and towns in Nishitama County at the city's most western edge pared down to 275 per square kilometer; its islands, 82 per square kilometer.

Within the city's wards, Toshima Ward edged out Nakano Ward by only 2 persons at 21,844 people per crushing square kilometer for the densest area in Tokyo. Shinjuku Ward (19,005) followed closely with Meguro Ward (18918) not far behind.

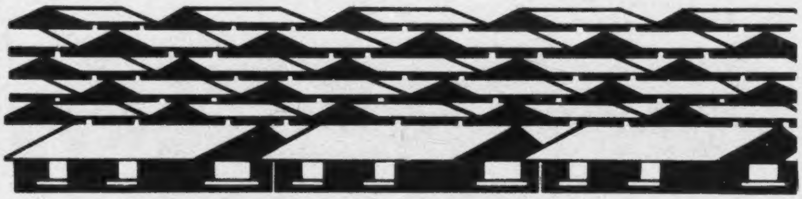
Only the outlying wards and the wards to the east of the Edo River and along Tokyo Bay's port area, as well as the city's business and financial center--Chiyoda Ward--which includes the spacious Imperial Palace grounds, had a population density of less than the average.

The wards that cluster around the city's center held 71 percent of its population in 1983, but only 27 percent of its land mass. It cities, towns, and villages, which lie on the western outskirts of the city, held 28 percent of the population in 54 percent of the land. The remaining 19 percent of the land is accounted for by islands with a total population of 33, 234 in 1983.

### THE AGING OF TOKYO

With migration to Tokyo taking a U-turn--Tokyo lost about 8,000 persons to other prefectures in 1983--and the low birth and death rates of the early 1980s remaining fairly constant, the pace of Tokyo's population growth should slow with population peaking around 2000, then heading gradually for stability. As a result, Tokyo's population will show a rise in the proportion of elderly people as those already born shift into advanced age, while the number of births diminish. Tokyo's *dankai-no-sedai*, or lump (baby boom) generation, will move into middle- and old-age by the year 2000, adding momentum to the aging of society.

COMPARATIVELY SPEAKING



***In 1984 the Japanese built and sold twice as many new homes per capita as were built and sold in the United States.***

Illustration by Diana Sousa

COMPARATIVELY SPEAKING

At present, about 50 percent of the Tokyo population is in the age groups from 25 to 59. Tokyo's youth, aged 0 to 14, numbered 2.2 million in 1983. Those in their prime, aged 15 to 64, totaled 8.3 million, and the old, aged 65 and up, nearly a million. Although the population is still relatively young, the older age groups will rapidly expand in coming years as the large percentage of the population in the middle-age groups move upward into old age. This trend will be reinforced by the continued lengthening of the average life span.

The share of those aged 65 or over is projected rise to 15.6 percent by the year 2000 from 9 percent in 1980. One out of every 6 people in Tokyo will be aged 65 or over in the year 2000, compared with one out of every 11 in 1985.

The Tokyo Municipal government as well as industry planners are fittingly worried over all these graying hairs. The aging of Tokyo's population, as for all of Japan, will change the balance between the productive population and the dependent population.

Until 2000, the increase in people aged 65 or over will be counterbalanced by the number of people in the younger generation (those under 20). The productive population will increase slightly until around the year 2000, from 60 percent in 1980 to 61 percent in 2000. However, by 2015, the productive population will decrease to 55 percent. As the productive population supports the economic life of other people, three workers (in the year 2015) instead of the current eight will split the cost of supporting one retired person in 2015. Forty percent of Tokyo's GNP will be needed to support its aged.

The aging of Tokyo presents looming problems to a society used to expansive growth. In less than 40 years, the country with the lowest proportion of elderly in its population of any advanced country will have the highest. Already, loneliness and isolation of old age settles in on Tokyo's aging. As the Japanese household gets increasingly smaller, widowed groups of old people stage marches demanding more services from the Ministry of Health and Welfare in Tokyo.

In an effort to stave off the effects of an aging workforce, the Japanese government offers subsidies to companies that raise their compulsory retirement age to 60.

## HOUSING

With an average population density of 5,436 people per square kilometer in the Tokyo area, housing is an ongoing problem. The number of households in Tokyo registered over 4 million in 1983, up from about 3.5 million in 1973.

The average dwelling went from 3.08 rooms in 1973 to 3.45 rooms in 1983. Although still small by comparison to dwellings in most developed countries, noticeable strides have been made since 1968 when the average dwelling of a mere 350 square feet--or the equivalent of one or two modest-sized rooms in an American development house--housed four people. By 1983, Tokyo dwellings averaged nearly twice this size due to a sharp rise in housing starts during the economic go-go years of the 70s.

Owner-occupied homes in Tokyo averaged 4.9 rooms with 968 square feet of floor space in 1983, up from 941 square feet and 4.62 rooms in 1973. Rented dwellings averaged 2.31 rooms per dwelling with 354 square feet in 1983, up from 2.08 rooms in 1973.

Even though the cost of land around Tokyo increased twentyfold from the mid-1950s to the 1970s and housing starts plummeted after the 1973 oil crisis, the Japanese home building industry remained healthy due to the Japanese penchant to save, favorable financing--an employee usually taps his employer, bank, and government--and the strong desire for homeownership.

Housing starts in Tokyo rose sharply from 1975 until 1978 dropping steeply and continuing to decrease until 1982. However, the overall rate of new housing starts has remained relatively high by international standards. In 1984, the Japanese built and sold twice as many homes as were built and sold in the United States.

Tokyo's housing stock has grown

*continued on p. 6*

INSIDE INFORMATION

# Tokyo's Quiet Revolution

Tokyo remains the hotbed of a quiet but relentless revolution that started in the early postwar years--that of the urban, educated, middle-class woman. Quiet because open rebellion in Japan means becoming an outsider--the unthinkable in a society where an individual cannot achieve real stature or success except as a part of a group. Relentless because the mechanization of the home, effective birth control, and impressive increases of women's participation in higher education, the workforce away from family enterprises and farms, and the community have created a new Japanese woman, one who increasingly aspires for significant achievement outside the home.

A 1984 survey conducted by the Tokyo Municipal Government on women's social status revealed that two out of three Tokyo women consider that their social status has been raised in the past ten years, while three out of four still point out remaining sexual discrimination against women. Seventy-eight percent of the women polled saw improvement in their social status in the home, 77 percent in the workplace, and 63 percent in generally accepted ideas, customs, and practices. However, only 53 percent thought that they had gained status in education or in the political world.

Perhaps the most movement in the world of Japanese women has occurred in their work. Women at work are nothing new to the Japanese. Almost 40 percent of the total workforce has been made up of women for decades, mostly as farm laborers and workers in family businesses. What is new is where they work. From 1950 to 1980, paid women employees tripled from just over 4 million to 13.5 million, with a rate of increase double that of men since 1975 due to skyrocketing labor demands in the economic miracle years of the 1960s and 1970s, the declining birthrate, and increased participation by young people in higher education. Now more than half of all women over the age of 15 hold jobs; 57 percent of them are married.

No longer the stereotypical young, unmarried, short-term worker, the average age of women workers was 34.9 in 1980, up from 23.8 in 1949 and 29.8 in 1970. The percentage of employed, nonagricultural women who are married rose sharply from only 8 percent in 1952 to 67 percent in 1979 (including the widowed or divorced); and the average term of service with one employer rose from 3.2 years in 1952 to 6.3 in 1982 compared with 10.8 for men.

The age distribution of women workers mirror that of other developed countries with a bulge at the 20-to-24-year-old group, a trough for those in the childbearing years of 25-to-34, and another bulge at the 40-to-early 50s.

Women over 35 are returning to work in increasing numbers for reasons of both economic necessity and personal fulfillment. Those over age 35 find themselves with their children in school, educated minds, and a long stretches of free time before them. Of the nearly 15 million women who work, about 5 million hold down part-time jobs. An astounding 91 percent of part-time workers in Tokyo in the 1970s were women over 35. More than 80 percent were married; more than 70 percent had school-age children.

The surge in women workers particularly into part-time jobs has solved problems while it has created others. Housewives can both fulfill household duties and provide supplementary income. The typical part-time worker--a housewife in her 30s or 40s who is doing a simple production, clerical, sales, or service job in a small- or medium-sized business--now earns nearly 10 percent of total household income. In 1982, more than 86 percent of housewives worked to supplement family income, mainly to make higher education possible for their children.

However, part-timers have legitimate complaints of long hours, low pay, and a lack of benefits. A 1984 Sangyo Research Institute survey found that the typical female part-timer has worked for 3.5 years, averaging 6 hours a day, 5.3 days a week. Her average monthly wage of only about $2.35 an hour was one-third that of full-time women employees. Adding in less vacation, smaller bonuses, and little if no health, unemployment, and pension benefits, part-timers add up to what many Japanese analysts are terming an essential feature of the Japanese workforce--cheap labor.

A 1983 government survey found that married part-timers between the ages of 35 and 54 now account for a quarter of the labor force and 60 percent of all female employees. At present 80 percent of all Japanese businesses depend to some degree on part-timers. And with continued vigorous growth of the retailing and service industries coupled with Japan's increasingly aging population, part-timers will most likely continue to be a labor bargain in times of economic upturn.

In general, Japanese women earn far less than their male counterparts. In 1983, their average monthly wage of $770 was 52 percent of the $1,470 men earned, up however from only 42.8 percent that of men's earnings in 1960. About 2 million of Tokyo's 11.6 million residents are working women aged 25 and up earning an average of $10,000 a year.

Despite a national consensus on the rising status of women, the majority of working women occupy low-level, low-paying jobs largely because women routinely quit work in their mid-20s to raise families. Traditionally, they have been expected to take *koshikake* (an unpadded chair comfortable only briefly) jobs, or temporary seats. However, due to a shortage of new male entrants in the labor force, young women are now entering such previously all-male professions as computer programming. Some are even beginning to hold influential positions in Japan's fast-growing service and retailing sector.

Although nearly twice as many women graduate from college today as ten years ago--some 96,000 in 1981--a 1981 study by the Women's and Minor's Bureau of The Labor Ministry reported that 73 percent of companies recruiting university graduates had a policy of hiring only males. Another more recent survey found that of the 990 companies surveyed, 73 percent did not plan to hire any university female graduates in 1985. •

to accommodate its burgeoning population. In 1983, Tokyo's over 150,000 housing starts outpaced those of any other prefecture in Japan. Of these, nearly 44 percent were rental homes. The Tokyo wards registering the most starts were Setagaya with 13,137; Nerima, 9,647; Suginami, 7501; and Ota, 7239. In the outlying districts, Hachioji City, Machida City, and Chofu City had the most housing starts.

Of Tokyo's 4,028,600 dwellings in 1983, 44 percent were owner occupied, compared to 39 percent just ten years earlier. Of the nearly 2.25 million dwellings for rent, the majority--83 percent--were privately owned. Only 10 percent were publicly owned, mostly found in Adachi, Koto, and Kita Wards. Another 7 percent were owned by public corporations for the use of their employees and their families.

Tokyo, for the most part, is a vast sprawling city with a low profile. Thirty-eight percent of all Tokyo dwellings are detached houses; 58 percent are apartment houses of which only 19 percent are over six stories high; and 4 percent are tenement houses.

With land prices skyrocketing beyond the income levels of average Tokyoites, low-priced, pre-fab houses are gaining popularity. In 1980, a 700 square foot Tokyo home sold for about 5 or 6 times the annual income of a highly paid industrial worker. Improved land, which costs an average of $250 a square foot in Japan versus $7 to $10 in the U.S., accounts for 70 percent of the cost of buying a new home.

No wonder then that prospective home owners want to cut down on building costs. Two- and three-storied prefab houses with separate facilities are in strong demand as a cost-effective way to use a tiny plot of exorbitantly priced land to house a 2- or 3-generation family. Prefab houses now hold about 15 percent of the housing market, with their share expected to rise.

Homeowners upgrading to bigger or better homes spend the top end of the range of about $70,000. Younger new homeowners buy more modest models at around $48,000.

Besides from price, many Tokyoites buy prefab homes for their Western styling--gables, patios, picture windows on the outside; carpeted rooms, separate bedrooms, dining rooms, and living rooms instead of the traditional multi-purpose rooms on the inside.

Not only prefab houses, but other new homes retain traditional post-and-beam construction while donning Western exteriors

## TIPS ON TRADE

### Is China your market? How to find out

The China market is no longer a mystery, according to Bernard E. Conor, an international consultant specializing in trade with the People's Republic of China. Gone are the days of tedious haggling over contract language and endless frustration with misunderstandings bred from cultural differences.

With an acceptance of international business practices and procedures and a commitment to relax restraints on foreign trade, China is swinging its doors wide open. But are these doors your company should venture through?

Conor suggests that before getting your foot in the door it's wise to seek professional help from any of the many public and private organizations now offering assistance to those interested in trade with China. Trading with China takes considerable commitment, time, and energy, so careful preparation pays off.

Luckily, in contrast to just a few years ago, there's plenty of help within easy reach for businesses, big and small, interested in the China market. The following list only partially covers organizations and individuals giving assistance to businesses and entrepreneurs looking for opportunities in the PRC.

- **The U.S. Department of Commerce** offers an entire range of service from disseminating general information on Chinese laws and regulations on foreign investment to one-on-one counseling with businesses interested in trade with China. Industry specialists are available to talk with you about opportunities for your product. The department also organizes technical sales seminars, executive trade missions, and trade shows. For more information on how the department can help you, contact: U.S. Department of Commerce, International Trade Administration, Washington, DC 20230.

- **Arthur Andersen & Co.** offers both consulting services and tax services. They maintain an office in Beijing, an advantage to those businesses unable or unwilling to spend the $250,000 yearly price tag for renting an office in China's capital. Arthur Andersen & Co. assists clients in joint venture negotiations, performs and assists in feasibility studies, and assists in contract reviews, training financial and accounting personnel, economic consulting, operational reviews, and tax compliance and consultation.

- **Ernst & Whinney's China Division** assists clients in their efforts to invest in and trade with China, on matters concerning accounting, auditing, tax, management consulting, and others. They also maintain an office in Beijing as well as one in Guangzhou. Contact Ernst & Whinney, International Operations, 153 East 53rd St., New York, NY 10022; telephone (212) 889-9100.

- **Kamsky Associates, Inc.** is a consulting firm specializing in trade with China. Kamsky Associates offers a wide range of consulting and on site services, such as assessing market potential, arranging for and guiding first-hand looks at Chinese factories, helping negotiate and execute contracts, and following up on business deals. Contact Kamsky Associates, Inc., 70 Pine St., New York, NY 10270.

- **Small Business Service Bureau, Inc.** has a membership of over 38,000 small and mid-sized businesses. SBSB offers Mom-and-Pop companies reasonably priced help. It arranges factory and China visits, makes sure to match companies with Chinese counterparts so that all parties can meet their commitments, asseses a company's chances and makes appropriate recommendations, and recommends a consulting firm with onsite services in China to conduct day-to-day operations after a deal is struck. Contact Mr. Francis Carroll, President,Small Business Service Bureau, Inc., 544 Main St., Worcester, MA 01601; telephone (617) 756-3513.

- **Touche Ross International** is a public accounting, tax, and management consulting organization, with offices in Beijing. Touch Ross's China Consulting Services Department provides consulting services, including introducing clients interested in investing or selling in China to their appropriate Chinese counterparts. The department does market research, feasibility studies, negotiations, translations, and provides interpreters. Contact Touche Ross International, One World Trade Center, New York, NY 10048; Telephone (212) 839-6600.

- **Ms. Mary Wadsworth-Darby** is an international consultant specializing in China. Although still young, she is considered an "old China hand." She can be contacted at 25 W. 81st Street, Apt. 8-C, New York, NY 10024; telephone (212) 580-8465.

- **Mr. Bernard E. Conor** is an international consultant specializing in China. He can be reached at 667 Perkins Road, Greenwich, CT 06830; telephone (203) 661-1446. •

and interiors. More expensive models have larger square footage (two stories with four bedrooms on the second floor is common) and offer a wide range of design options. Kitchen-family room combos that bring the homemaker and family together are becoming increasingly popular. Amenities such as whirlpool baths, tilework, and fireplaces are becoming more common.

Rapid growth in expenditures on housing and home furnishings (doubling from 1972 to 1978) indicates the strong urge for improved home environments. Continued expansion of the home furnishing and electric appliance market is anticipated due to a rise in the purchasing power of the surging yen and continued interest in Western styling in home interiors.

**HOUSEHOLDS**

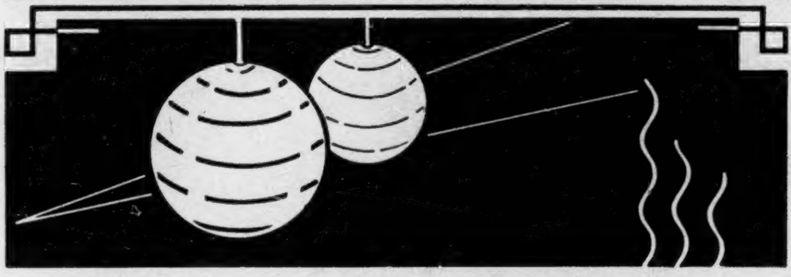
The typical Japanese household of married couple and two children made up nearly one-quarter of all Tokyo households, numbering 916,300 in 1983. However, single-person households (1,128,600) predominated. Although only 16 percent of the total nationwide, single-person households in Tokyo accounted for 28 percent of all households in 1983, of which only 9 percent were made up of people over 65.

The predominance of single-person households reflects in part the presence of near 700,000 college and university students and growing numbers of working bachelors living away from home, although the majority of young singles still live with their parents until marriage in their mid- to late-20s. Also with more money to spare, both young and aged people are increasingly choosing to live alone rather than live with unrelated persons or relatives other than their parents or married children.

Two-person households made up 19 percent of the total, of which 69 percent, or 533,400 in 1983, were married couples. The 697,600 three-person Tokyo households were usually composed of a married couple and child, or older couple with an aged parent. Five-person and six-person households in 1983 made up 9 percent and 4 percent of all Tokyo households respectively.

Tokyo, as will all Japan, should have a significant increase in one-person households because of more widowed choosing to live alone. In particular, the number of aged women living alone will reach a level 2.5 times the present level by the year 2000 and 3.7 times by 2015. The increase in the number of ordinary households should slacken, reflecting slowed population growth, with the shares of both three-generation family households and nuclear family households declining due to an increasing share of one-person households.

COMPARATIVELY SPEAKING



***The proportion of household budget the average Japanese family spends on lighting and heating is about half that spent by its French, American, or English counterpart.***

Illustration by Diane Sears

COMPARATIVELY SPEAKING

As in all Japan, close to half of all family households are establishing homes away from their parents. Only about 10 percent of Tokyo's households now accomodate three generations under one roof. The average number of persons per Tokyo household was 2.78 in 1983 (down from 3.01 in 1973), as compared to 3.76 for all Japan.

**GOING SHOPPING**

Just one look at a Tokyo *shotengai* (neighborhood shopping street) or department store tells all when it comes to who spends the yen. Clearly it is women and, to a lesser degree, their children. Roughly 90 percent of department store customers are said to be women. Even housing ad flyers in major newspapers are targeted to women, not their husbands.

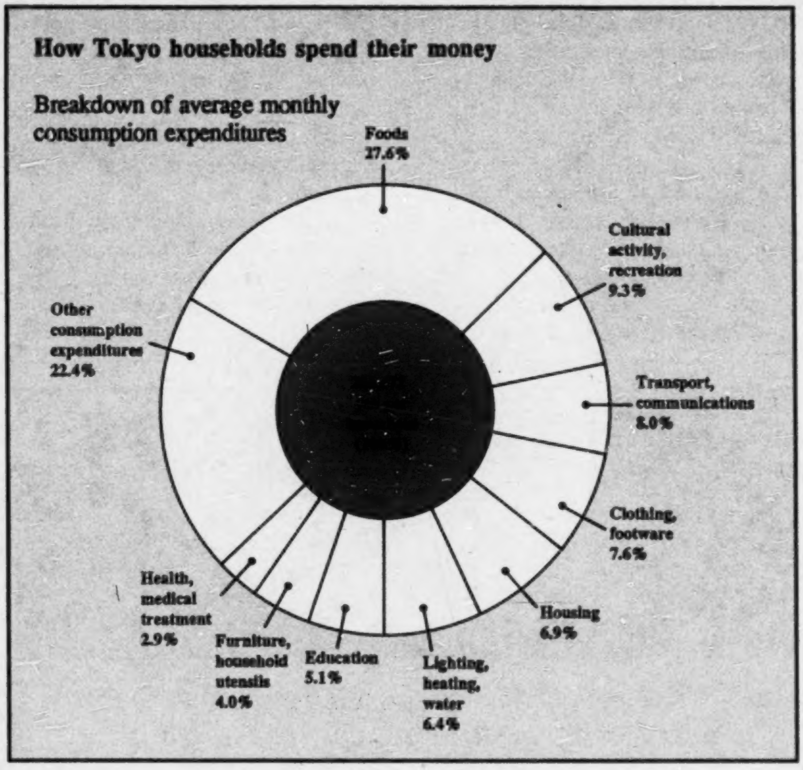
Japanese men traditionally hand over their paychecks to their wives. Women purchase most basic necessities of life with men becoming involved only when purchasing cars, stereos, TVs, and sports and leisure goods.

However, with more married women taking on part-time work, mothers are starting to rely on their teenagers to do some of the household shopping. As many as 60 percent of Japanese teens do some sort of household shopping on a regular basis.

Tokyo's women characteristically shop on a small scale, buying only what they can easily carry or tow. Off-street parking is limited and on-street parking nonexistent discouraging bulk-shopping by car.

Most Tokyo retail outlets are accessible by bicycle or foot, and department stores offer nationwide delivery services.

In Japan, the stores go to the consumer. Large retailers have small- to medium-sized branches in residential areas. Local stores continue to thrive with convenience stores, or small supermarkets open often around the clock, gaining


How Tokyo households spend their money

Breakdown of average monthly consumption expenditures

popularity especially among young single students and workers. The growth in door-to-door sales and mail order is expected to rise although it is now at a low level of consumer confidence.

Housewives shop daily for food and household needs and although supermarkets have proliferated, small stores remain the major outlet for daily shopping needs. Tokyo has a high concentration of small, individually owned stores with an average number of employees of 3.5, compared to 5 in the U.S. and Britain.

### HOW TOKYOITES SPEND THEIR YEN

As of the summer of 1985, the average Tokyo household spent about $1,225 per month, representing a real decline of 2.8 percent--the sharpest drop since 1973. However, with the yen appreciating and the government already talking about lowering taxes, household expenditure should rise in real terms.

The typical Tokyo household saves about 12 percent of its disposable income. The largest category of household expenditure in 1985 was food at nearly 28 percent. Cultural activities and recreation accounted for about 9 percent of monthly disposable income with transport and communications at close to 8 percent. Clothing and footwear purchases follow at 7.6 percent.

Spending patterns have changed drastically since the days of the "three sacred treasures"--refrigerator, vacumn cleaner, and clothes washer--and even more since the three C's--cooler (air-conditioner), color TV, and car. Now, with Japan's high rates of ownership of such consumer durables, marketers are increasingly involved in selling ways of life instead of products.

Product differentiation is becoming an increasingly important requirement. Isetan, one of Tokyo's largest department stores, for example, now markets goods targeted to young singles in its "Fresh Start" corner. This corner specializes in such goods as one-person rice cookers, miniature TVs, and reasonably priced beds and furniture of all styles and colors.

A selection of the most rapidly growing imports shows a trend toward faster expansion in items which have important discretionary expenditure components. Among nondurable goods, items for travelers expanded at almost 27 percent annually between 1973 and 1978, and publications, tapes, and records at 22 percent annually. Among durables, sales of automobiles expanded at 21.3 percent annually; watches, 16 percent; sporting goods, 7 percent; furniture, 18.5 percent; and electric appliances, 19.8 percent.

Priorities in spending for consumer goods tend to vary greatly with age, income, sex, and marital status in Japan. Two new types of spenders are beginning to emerge in the Tokyo area--young single workers and young married couples--with important implications for the future of imports.

### THE YOUNG SINGLES

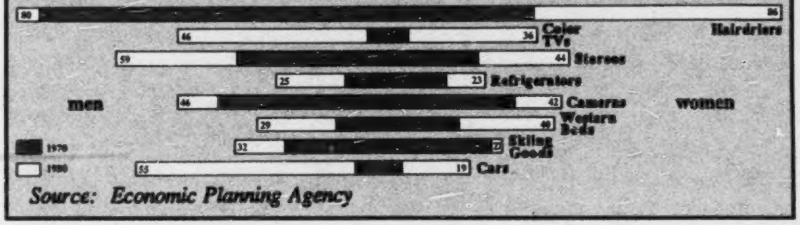
The Japan the rest of the world sees may be the ever-reserved, blue-suited businessman. But the new Japan walking around Tokyo wears ultra-fashionable clothes, spends mega-yen, and speaks its mind.

Concern is growing that today's young Japanese--having been brought up in comfort--cannot live up to the pace set by their famously workaholic elders. Their self-absorption, emphasis on private life, and easy-going lifestyle perplex older Japanese taught to uncomplainingly subordinate their personal interests to the achievement of collective purposes.

The new young Japanese would rather work to live than live to work. The new crop of workers are markedly less ready to submerge their personal ambitions and private lives to the success of the company. Practical, easy-going, and disturbingly money-minded, fewer than half of all male university students in a Japan Recruit Center survey conducted in 1980 hoped to work for one employer throughout their lives, compared to two-thirds in 1971. And a surprising one-third in

**What singles own**

**Diffusion of durable goods among 20-to-24-year-olds, in percent**



*Source: Economic Planning Agency*

1980 said they wanted to start up their own businesses at sometime in their careers.

Results from a poll taken by the Prime Minister's Office surveying activities which make life enjoyable show a trend toward a more relaxed lifestyle and a diminishing commitment to work. The percentage of young men and women between 20 and 24 who found satisfaction in working and social volunteering declined markedly between 1971 and 1980. Only 20 percent in 1980 said working was a source of satisfaction as opposed to 29 percent in 1971.

These new attitudes and behavior patterns of Japanese youth signify a deep and permanent change in Japanese culture and values. No doubt Japan's hedonistic turnaround has profound implications for the future of marketing in Japan. Already, market analysts see Japan's *seikatsusha*, or individual lifestyle enthusiasts, as the prototype of the future Japanese consumer. These new wave consumers buy products on the basis of design, or how well items fit their personal lifestyle. Gone are the days of keeping up with the Joneses or economic utility as king.

Although the Japanese population is rapidly aging--by the year 2000, the largest consumer group will be over 35--the singles market looks like the wave of the consumer future (as far as discretionary income expenditure goes). Single workers are the envy of budgeted married employees with families to support. The average monthly spending of single male adults on goods and services other than food and rent in 1982 was $191, compared with $175 for married men in 1980. Older workers earn more, of course, but are compelled to devote most of their income to family support.

Young working singles between 20 and 24 years spent roughly $220 a month--a third of their entry-level salaries--on food and housing. About another third of their income was spent on leisure, entertainment, cultural activities, and education. Thirteen percent was spent on clothing (nearly double that spent by the average Tokyo household) and only 5 percent on durables. Young singles saved 14 percent of their salaries.

Young working women who live at home with their parents are one of Japan's strongest consumer groups. With marriage increasingly delayed to between the ages of 24 and 27, they have a relatively large amount of discretionary income, spending nearly 15.8 percent of their total income on leisure.

Young adults between the ages of 20 and 24 are acquiring durables at brisker rates due to rapidly rising salaries. Over 50 percent of all young Japanese men owned cars in 1980 as compared to only 8 percent of them in 1970. Stereos, color TVs, cameras, room-sized refrigerators, and ski equipment purchases all showed marked increases in the same period. Women bought more Western beds than men, however.

Although both young men and women spent over one-third of their pocket money in the company of good friends, young women met their pals much more frequently , according to a survey taken in 1980. Young women got together with friends once a week to eat out, shop, and chat. Males tended to be more active with gambling, games, and sports ranking high on their lists of things to do when out with friends.

Imported items most likely to be already owned by young men are fountain pens, sportswear, and whiskey; among young women, perfume, cosmetics, handbags, and accessories.

## THE YOUNG MARRIEDS

More and more young Tokyoites are opting for later marriages. Once married, many young women continue their careers until their first child is on the way.

These trends have contributed to the emergence of a Japanese version of the American yuppie. Young working couples, although saving for the purchase of home, car, and education of their children, often are able to spend a large share of their income on nonessentials.

As a result of combined incomes, young working couples can afford top-of-the-line imports. Travel and participation in sports has become increasingly common within this group.

## SCHOOLING

The rigorous pace and pressure of Japan's primary and secondary schools are legendary. Students attend school 240 days a year, half days on Saturday (compared with 180 days in U.S. public schools). As if this is not enough, most students also go to *juku* , or cram schools, to help them pass comprehensive exams given at the end of sixth, ninth, and twelfth grades that track the best scorers to the best schools.

Education in all of Japan is compulsory through the ninth grade, with nearly 94 percent of students nationwide continuing on to high school. Over 35 percent of these graduates enroll in other forms of higher education.

The entrance exam for the nation's colleges and universities is the most crucial, as admittance to the best colleges and universities secures

# INSIDE INFORMATION

## Researching the European market

### A country-by-country cost comparison

France is probably the most expensive Western European country to research. Belgium is among the lowest in cost, with the Netherlands and the United Kingdom coming in just above and just below average.

A comparative cost study by Peter J. Hayes of RBL, Ltd., London, drew on four databases and the costs of more than 700 individual jobs. The costs were adjusted to the U.S. dollar which was widely fluctuating at the time of the study. Hayes found that research costs remained relatively unchanged between 1982 and 1984 in four country groupings from most-to-least expensive.

The most expensive group included France, Switzerland, West Germany, Norway, and Italy. Average and just below average costs were found in the Netherlands, Denmark, Sweden, Spain, and the United Kingdom. Below average costs prevailed in Austria, Belgium, Finland, and Greece.

While West Germany ranked in the expensive group overall, when just qualitative research was considered, its costs were below average.

The table shows the countries ranked from most expensive to least expensive for both quanitative and qualitative research.

Another factor taken into account was the cost of the senior management personnel involved with projects. West Germany, the Netherlands, Austria, and France had high executive costs, while the United Kingdom and Greece had the least expensive costs for executive participation.

Countries such as Austria, Belgium, and Finland "manage to combine very high costs in this area with low prices," according to Hayes, because of the "presence of a relatively smaller number of senior, very experienced executives" whose production "is extremely high."

There is great variation among countries in interviewer fees. One reason is that in France and Sweden, research companies are expectred to pay "social costs"--social security and the like--for their part-time freelance interviewers. To a lesser extent, the companies pick up these costs in Finland, Denmark, and the United Kingdom as well. In addition to the U.K., where, even with social costs, interviewer fees are relatively low, other low-fee countries are Austria, Belgium, Spain, and Greece.

Low executive costs and low interviewer fees in the United Kingdom should mean lower costs overall, it seems, but Hayes explains that is not the case. He suggests that researchers in the U.K. pay greater attention to fieldwork quality and supervision, that they do not effect cost savings in design, analysis, and report writing, and that they tend to treat an extended interview like a group discussion--taking the same time to do it and analyze it with savings only on recruitment costs.

A more complete report on Hayes' study is available in a bound version of symposium proceedings, International Market Research, available for 80 Swiss Francs from ESOMAR (The European Society for Opinion and Marketing Research), J. Viottastraat 29, 1071 JP Amsterdam, The Netherlands; telephone (020) 64.21.41. Telex: 18535 esmar nl.

### How they stand

**Western European countries ranked by research costs for quantitative and qualitative jobs.**

|  | *Quantitative* |  | *Qualitative* |
|---|---|---|---|
| 1 | Switzerland | 1 | France |
| 2 | France | 2 | Netherlands |
| 3 | Germany | 3 | Norway |
| 4 | Norway | 4 | Switzerland |
| 5 | Italy | 5 | Denmark |
| 6 | Sweden | 6 | Sweden |
| 7 | Denmark | 7 | Spain |
| 8 | Netherlands | 8 | Italy |
| 9 | United Kingdom | 9 | United Kingdom |
| 10 | Spain | 10 | Germany |
| 11 | Finland | 11 | Finland |
| 12 | Belgium | 12 | Belgium |
| 13 | Greece | 13 | Austria |
| 14 | Austria | 14 | Greece |

*Source: International Marketing Research, symposium proceedings. Paris: ESOMAR, 1984, p.22.*

*Paris:*

admission into the best companies after graduation. The University of Tokyo with its 3,000 places a year is the most prestigious school in Japan. Only success on the college entrance exams count. Other signs of intellectual excellence or well-connected relatives do not. About 38 percent of those taking the exams get into college on the first try. Most others succeed after a year of *juku* sessions.

Japan's rigid and highly competitive school system has led to not only the economic miracle but to problems as well. School phobia, characterized by fever, depression, autism, and suicide, accounts for over half of all mental illness among Japanese youngsters under 18.

The National Teacher's Union argues that students cannot develop their personalities fully in such a tightly controlled educational environment. They blame "examination hell" and the rote studying required to pass entrance exams for fostering rigid thinking, where all knowledge boils down to right and wrong with little allowance for deviation. This unwillingness to accept shades of gray has led to the current "bullying" crisis where students with the slightest sign of nonconformist attitudes are hounded, bullied, ostracized, and even pushed to suicide. The problem is so severe in Tokyo schools that the Tokyo Metropolitan Government recently mounted a "Let's Eliminate Bullying" campaign.

Nearly 3.25 million students (including college-level students) attend Tokyo's 5,083 schools. Most of the 1470 elementary schools and 837 junior secondary schools are public, while of the 461 senior secondary schools, just over half are private schools. Of the 1381 kindergartens (educating children from 3 to 5 years old), 1075 are private.

Nearly one million college-level students attend Tokyo's 102 colleges and universities, 81 junior colleges, and 358 special training schools. All but 13 colleges and universities are private; Tokyo's 12 national colleges and universities are the most prestigious.

Ninety-five percent of Tokyo's 168,904 junior high school graduates in 1983 went on to high school, equaling the nation's norm. Of Tokyo's 43,017 high school graduates in 1983 who entered the workplace, 30 percent entered the wholesale and retail trade, 31 percent the manufacturing industries.

Of Tokyo's 155,145 high school graduates, one-third went on to colleges or universities. Almost all of the advancing 22,496 male graduates entered college and universities (only 678 entered junior colleges) while only 43 percent of women graduates did so. Fifty-five percent of advancing women graduates entered junior colleges.

Twenty-eight percent of advancing graduates entered training schools and vocational schools. Thirty percent of all graduates entered the workforce full-time. Over the last 10 years, the advancement rate to university has declined at about the same pace that the advancement rate to special training schools has increased.

## THE RANK AND FILE

Nearly six million workers or over one-tenth of Japan's workforce fuel Tokyo's industries. About half of Tokyo's rank and file in 1983 worked in the service and retail sector; just over 25 percent worked in manufacturing; 12 percent in transportation and communication; 9 percent in finance and insurance; and 8 percent in construction.

Monthly cash earnings for Tokyo workers averaged $1,531 in 1983 (up from $1,337 in 1979) nearly 20 percent more than the amount the average Japanese worker pockets nationwide.

Iron and steel workers received the highest monthly cash earnings, averaging $1,929 in 1983. Service workers came in second, drawing $1,585 a month. Workers making textile mill products and apparel and related products brought up the rear with $1,251 and $1,155 respectively.

## CHANGING EMPLOYMENT

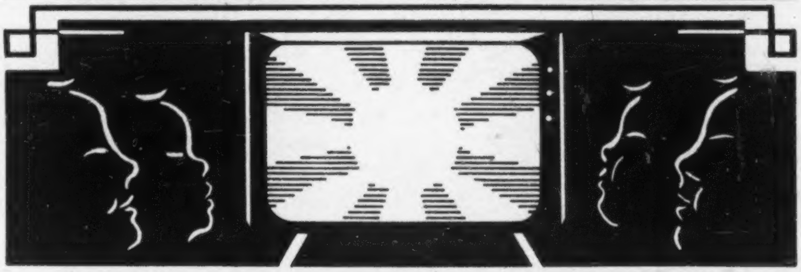
Until the oil crisis slowed Japan's accelerating growth, there were more jobs to go around than workers to fill them. Now, with Japanese industrial corporations rapidly automating to cut payroll costs, job shortages are chronic with no relief in sight. Nationwide, manufacturing workers declined from 14.4 million in 1973 to 13.7 million in 1980. By 1990, when the children of the first baby boomers begin to glut the job market, Japan will face a former unknown--unemployment. With more job seekers looking for work than ever before, many will find closed doors.

To absorb new entrants into the job market, government business planners recommend increasing days off from 101 days a year to 140 days a year by switching to a five-day work week, extending Golden Week holiday from 4 days to a full week, and encouraging workers to take their full annual vacations. Another plan is to encourage training workers as specialists instead of the generalists who now predominate on company payrolls. This should help facilitate job hopping, a former no-no in Japan's "company-man" workplace.

Another tack is to spread work among more people by encouraging job-sharing and part-time work. Planners now recommend that up to a third of a company's total workforce should be made up of part-timers. What all this means is that by the year 2000, one out of every three workers will be a part-timer or a temporary, compared with one out of six now.

Complicating all these plans is the reality of a rapidly aging workforce. Already subsidies, retaining incentives, or tax incentives are offered for firms continuing workers beyond normal retirement age or recruiting new employees from the ranks of the 55-to-64 age group.

COMPARATIVELY SPEAKING



***The average Japanese family spends 8 hours and 15 minutes watching TV daily compared to 7 hours and 10 minutes the average American family spends.***

Illustration by Diana Sousa

COMPARATIVELY SPEAKING

## SOURCES

Most of the information found in this profile was taken from *The Tokyo Statistical Yearbook 1983* , which was compiled by the Tokyo Metropolitan Government. To order, write the Tokyo Municipal Governmnet, Liason and Protocol Section, International Communication Division, Bureau of Citizens and Cultural Affairs, The Editorial and Distribution Office, 5-1, Marunouchi 3-chome, Chiyoda-ku, Tokyo, Japan. *The Yearbook* costs 4000 yen, or about $25. Payment must be in yen.

A good source for current news and demographics about Tokyo is *The Tokyo Municipal News*, a quarterly newsletter published by the Tokyo Municipal Government. The back-page section, "Graphic View of Tokyo," often charts recently released demographic data. Other sections offer results of recent surveys on

*continued on p. 12*

Tokyo life and analyses of various consumer trends.

The Japan External Trade Organization (JETRO) is an excellent souce of information on Japan. "Japan's Market Profile" is the latest addition to the more than 200 informative publications available from JETRO. In addition, a 16mm PR film "The Japanese Consumer" has just been made available. For a full list of JETRO publications and ordering information, contact JETRO, 1221, Avenue of the Americas, New York, NY.

The best place to obtain demographic information about Japan is from the Statistics Bureau, Prime Minister's Office. The Japanese statistical system is one of the best in the world. For a list of publications and ordering information, contact Government Publications Service Center, 2-1, 1-chome, Kasumigaseki, Chiyoda-ku, Tokyo, Japan. *Denise Rusoff, Editor* •

### Correction

The first line in Tips on Trends in our February issue should have read, "After several years of economic austerity, during which incomes were cut by an average of 11 percent in relation to 1979, the new democratic government of President Sarney seems determined to get the Brazilian economy back on a pattern of steady growth." •

## FEATURE

# Webster University Goes International

With campuses in several states and three countries, Webster University is not just another commuter college.

Total enrollment in 1985 was 6,321, at 38 sites around the world. Some 3,100 are at the St. Louis campus, another 1,000 are on international campuses and the remainder studying at facilities in five states and at more than a dozen military bases.

The move to serve military facilities began in 1974, when the Department of Defense asked the university to establish a campus at nearby Scott AFB, Illinois. There, Webster served military officers completing advanced degrees as part of their continuing education programs.

The program was successful and the Department of Defense requested other facilities be established so officers who were transferred to new duty stations could continue the program. Promotion of the program is handled by the military.

Webster became an international institution with the opening of a facility at a military base in Iceland.

In 1981, at the invitation of the Austrian government, it opened a facility in Vienna, to serve an English-speaking international community with undergraduate and graduate programs. The university also has campuses in Geneva, Switzerland and Leiden, the Netherlands. About two-thirds of the students are enrolled in undergraduate courses and a third in graduate programs. Programs include management, international affairs and politics and computer data management.

Most students are employees of international agencies or companies. Many students return to their native countries to hold executive positions. Others stay in Europe, working for multinational corporations.

Programs at the European sites are co-ordinated with each other and with programs at the Webster campus in St. Louis, allowing students to move from one site to another without disrupting the sequence of studies leading to a degree. Marketing and advertising of the European sites are handled through an office in Europe.

*Reprinted with permission from* Admissions Marketing Report, *Vol. II, No. 1, January 1986.* •

## COMING UP

**Zambia:** Africa's most urbanized country south of the Sahara.

**Graying Australians** are overlooked by marketers.

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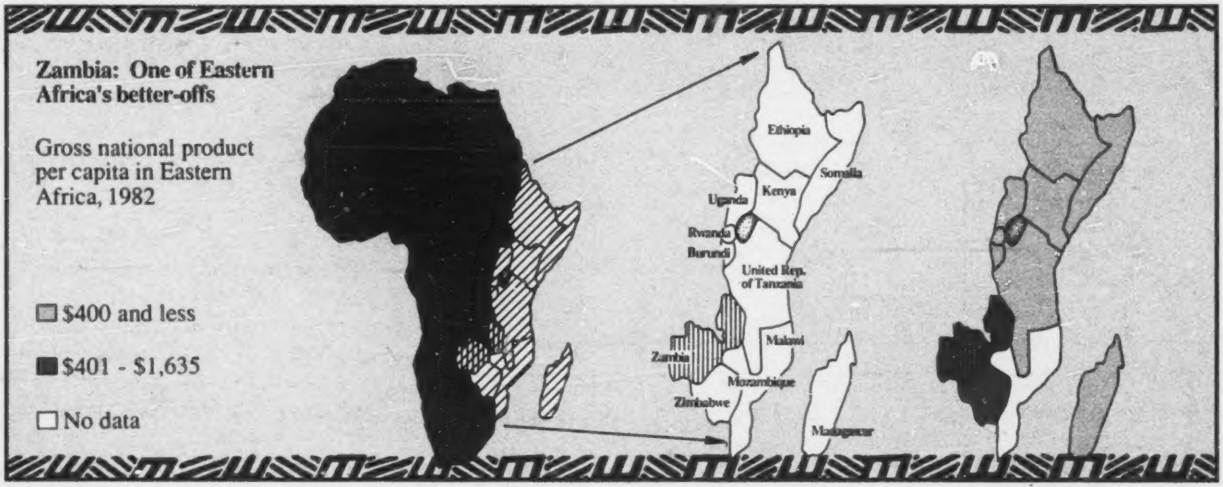
CONSUMER TRENDS AND MARKETS ABROAD
MAY 1986 VOLUME 5, NUMBER 5

# International Demographics

Zambia: One of Eastern Africa's better-offs

Gross national product per capita in Eastern Africa, 1982



COUNTRY PROFILE

## The Republic of Zambia

At independence in 1964--a year after the dissolution of the British colonial federation formerly made up of Northern Rhodesia (today's Zambia), Southern Rhodesia (today's Zimbabwe), and Nyassaland (today's Malawi)-- Zambia's economic future looked brighter than that of most other developing countries. Its copper production accounted for 8 percent of total world production--making it the world's fifth largest producer. In addition, only neighboring Zaire outpaced it in the production of cobalt. Its Central Province around Kabwe (Broken Hill) held rich deposits of both zinc and lead; uranium deposits also had been found, but their projected yield remained undetermined.

But since 1974, the decline in the price of copper and the increase in the price of oil--Zambia's major import--have played havoc with Zambia's balance of payments. Copper, which accounted for 40 percent of the GNP and 98 percent of all foreign exchange in 1964, shrank to 12 percent of the GNP in 1978 while still generating most of the foreign exchange. As a result, imports were cut back drastically from $1.5 billion in 1973 to $690 million in 1983.

Although this trend is beginning to make a U-turn, with oil prices dropping and copper prices rising, Zambia's economic situation remains grave. In 1984, the GNP continued registering negative growth (-1.3 percent), inflation stood at 25 percent, and the *kwacha* , the already besieged national currency, was further devalued.

Zambia's major trading partners--Great Britain, the United States, Japan, Saudi Arabia, South Africa, Italy, and West Germany--together bought $866 million of minerals, tobacco, peanuts, and corn in 1983. Trade with the U.S. fluctuates widely, oscillating around imports of about $120 million and exports of about $80 million annually.

*continued*

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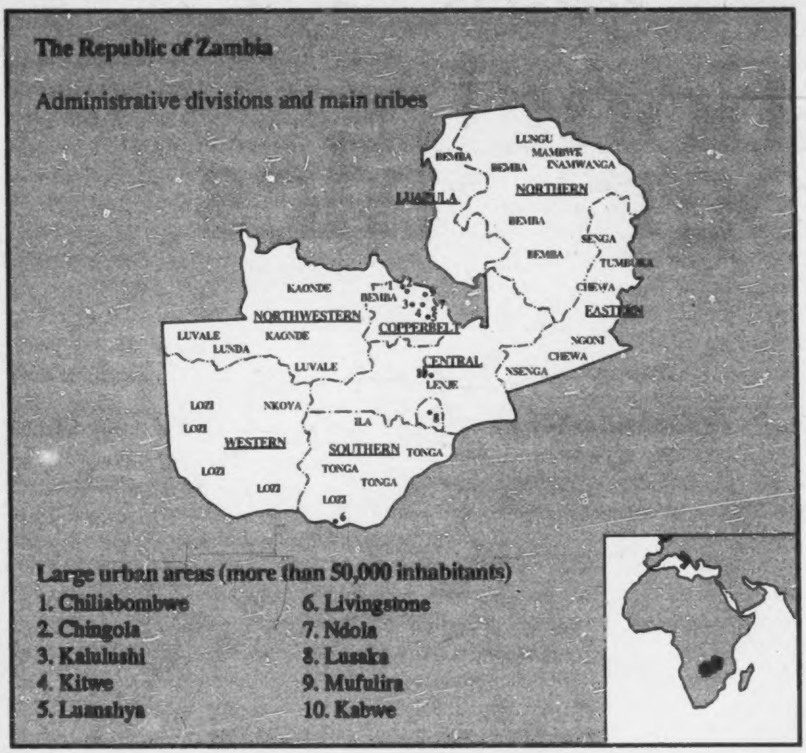
THIS MONTH: ZAMBIA



**The Republic of Zambia**

**Administrative divisions and main tribes**

**Large urban areas (more than 50,000 inhabitants)**

| | |
|---|---|
| 1. Chililabombwe | 6. Livingstone |
| 2. Chingola | 7. Ndola |
| 3. Kalulushi | 8. Lusaka |
| 4. Kitwe | 9. Mufulira |
| 5. Luanshya | 10. Kabwe |

## ZAMBIAN HUMANISM

Despite an unsuccessful coup in October, 1980, Zambia's government is one of the most stable in the region. Since independence, the United National Independence Party (UNIP), under the leadership of President Kenneth Kaunda (last reelected in 1983), has governed Zambia. Kaunda has tried to reduce the influence of tribal law through a highly personal brand of socialism, called Zambian Humanism.

One motto of Zambia's version of African socialism calls on the economy to serve man, not vice versa. In accordance with this ideal, the Mulungushi Reform of 1968 placed 51 percent of the shares of Zambia's 26 largest companies under government control. Unfortunately, government interference in the economy did not always prove beneficial, and a more pragmatic economic policy placing more emphasis on the private sector and greater receptiveness to foreign investment was instituted in 1977 with the passing of the Industrial Development Act.

The 1972 Constitution declared Zambia a one-party nation. The president serves a 5-year term. Parliamentary representation rests with the 135-member National Assembly, although actual political power is wielded by the 25-member Central Committee of the UNIP.

## CITIES AND REGIONS

With its 290,586 square miles, Zambia is slightly larger than the combined area of Nebraska, Kansas, Iowa, and Missouri. Zambia's terrain is mostly sloping plateau with altitudes varying between 3,000 and 5,000 feet. Cattle-raising country in the south is rather dry, whereas the north and northwest receive more rain. The best agricultural land lies in the central portion of the country, also home to Zambia's major cities.

Administratively, the country is divided into 9 provinces, which are further divided into 57 districts. Each province is administered by one member of the Central Committee of the UNIP. Districts are headed by district governors appointed by the president.

The largest city and the nation's capital, Lusaka, lies in Lusaka Province, bounded on three sides by the southern border of Central Province. Lusaka Province is home to nearly 700,000 people, of which slightly over half a million live in Lusaka City. The planned community of Kafue with a total population of 29,794 people lies slightly south of the capital and is the only city in the area founded after independence.

While Lusaka acts as the country's administrative center, Zambia's economic and demographic hub lies further north in Copperbelt Province. Home to 1.25 million Zambians, or nearly 22 percent of the total population, Copperbelt Province is Zambia's most populous province. Seven of ten cities with more than 50,000 inhabitants are located in Copperbelt Province. The city of Kitwe houses 314,794 Zambians; Ndola, 282,439; Chingola, 145,869; Mufulira, 149,778; Luanshya, 132,164; Chililabombwe, 61,928; and Kalulushi, 59,213. The only other cities of any importance are Kabwe, also called Broken Hill, the capital of Central Province, with a total population of 143,635 people and Livingstone, the capital of Southern Province (total population, 71,987), located near the Zambezi River's famous Victoria Falls.

All of these cities lie along the "old line of rail," which runs from Lobito, Angola north to Lumumbashi, Zaire, turns southeast and continues on to the Copperbelt cities, Lusaka, and Livingstone, and

International Demographics

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travels further south into Zimbabwe to its final stop in the port of Beira, Mozambique.

With its urbanization rate doubling from 21 percent in 1964 to 43 percent in 1985, Zambia is now the most urbanized country south of the Sahara. Copperbelt Province and Lusaka Province are the most urbanized provinces. They house 34 percent of Zambia's total population and account for nearly 71 percent of its urbanized population. Ninety-two percent of all Zambians in Copperbelt Province live in urban areas.

The remaining provinces are predominantly rural--only eight towns have more than 10,000 inhabitants--with 85 percent of their population living in the countryside. Eastern Province is Zambia's largest agricultural region. Its capital, Chipata (also called Fort Jameson), has a total population of 32,291. The low Muchinga mountains separate Eastern Province from Northern Province (capital, Kasama; population, 38,093) and the very poor Luapula Province (capital, Mansa; population, 34,801). The most sparsely populated areas are Northwestern Province (capital, Zambezi; population 8,166) and Western or Barotse Province (capital, Mongu; population, 24,919).

## POPULATION AND GROWTH

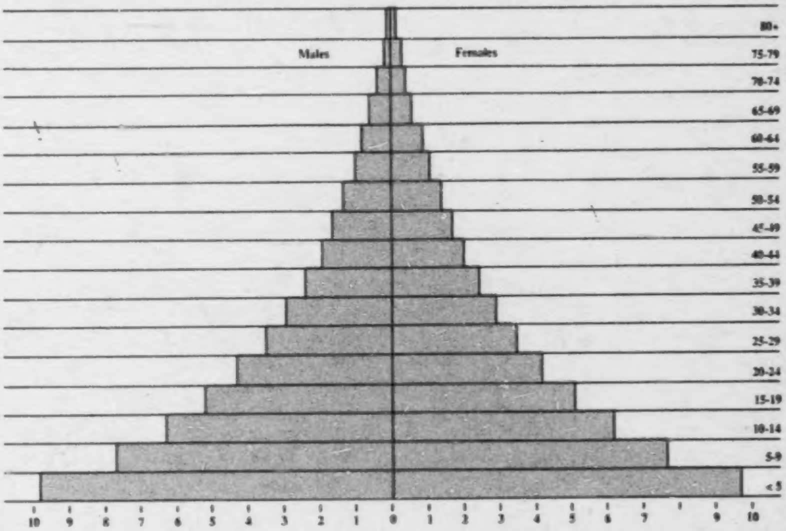
Zambia's 1985 population is estimated to be 6.8 million. The1980 census counted 5.68 million, up from 3.49 million in 1963, and 4.06 million in 1969. Between 1963 and 1969, the average annual population growth rate was 2.5 percent; between 1969 and 1980, 3.1 percent. Although high when compared to other developing countries, Zambia's population growth rate is in line with those of other East African countries. Kenya, Rwanda, Tanzania, Sudan, and Zimbabwe all have annual growth rates of over 3 percent. Zambia's population growth rate is expected to continue to climb, peaking at 3.5 percent in the year 2000 at which time Zambia is expected to have 11.2 million inhabitants.

The current birthrate of about 48 per 1,000 is expected to decline only marginally in the next 15 years, but the death rate is declining more rapidly: from 19 per 1,000 in the late 1960s to 15 per 1,000 in 1985. Concomitantly, life expectancy is expected to rise from the current 51 years to about 58 years. The total fertility rate (the mean number of children a woman will have borne by the end of her reproductive period) should diminish little, from 6.9 to 6.5 by the year 2000. Infant mortality, currently hovering around 100 deaths to infants under one year of age per 1,000 live births, could decline to 75 by the year 2000.

International migration is not an important factor in Zambia's population balance. The annual number of immigrants to Zambia is usually fewer than 4,000. Temporary visitors are of more importance, numbering between 100,000 and 150,000 in any given year. Immigrants come mainly from the United Kingdom, Asia, and other European and African nations. Visitors are predominantly from Zimbabwe, Zaire, Malawi, and Tanzania.

The province of Lusaka, which maintained an average annual growth rate of 6.3 percent between 1969 and 1980, is Zambia's most rapidly growing industrial area. The capital of Lusaka grew at a rapid annual rate of 6.8 percent, although slower than the 13.4 percent average annual growth rate registered between 1963

**Zambia: estimated total population by age and sex, 1985**



| Age | Total | Males | Females |
|---|---|---|---|
| All Ages | 6,664,000 | 3,312,000 | 3,352,000 |
| 0-4 | 1,294,000 | 650,000 | 644,000 |
| 5-9 | 1,022,000 | 512,000 | 510,000 |
| 10-14 | 839,000 | 423,000 | 416,000 |
| 15-19 | 688,000 | 346,000 | 342,000 |
| 20-24 | 567,000 | 284,000 | 283,000 |
| 25-29 | 466,000 | 232,000 | 234,000 |
| 30-34 | 381,000 | 189,000 | 192,000 |
| 35-39 | 318,000 | 158,000 | 160,000 |
| 40-44 | 263,000 | 129,000 | 134,000 |
| 45-49 | 218,000 | 106,000 | 112,000 |
| 50-54 | 178,000 | 85,000 | 93,000 |
| 55-59 | 142,000 | 67,000 | 75,000 |
| 60-64 | 110,000 | 51,000 | 59,000 |
| 65-69 | 80,000 | 37,000 | 43,000 |
| 70-74 | 53,000 | 24,000 | 29,000 |
| 75-79 | 30,000 | 13,000 | 17,000 |
| 80+ | 15,000 | 6,000 | 9,000 |

*Source: United Nations, World Population Prospects: Estimates and Projections as Assessed in 1982.*

## INSIDE INFORMATION

### "New" Qualitative Research in Europe

It's boom times for qualitative research on consumer behavior, according to European researchers speaking at the European Society for Opinion and Marketing Research (ESOMAR) qualitative research seminar held in Amsterdam in February.

Granted, developments in qualitative research are not as spectacular and conspicuous as those in quantitative research--where innovation is mostly caused and accelerated by technological developments in data collection, processing, and analysis--but "new" qualitative methods are certainly in demand. In the United Kingdom alone, 30 million pounds or over 20 percent of all United Kingdom research spending is allotted annually to qualitative research into consumer behavior, according to Stephen Wells, managing director of The Consumer Connection, Ltd., and Tony Lunn, managing director of Advanced Behavioral Research, Ltd.

Britain's boom in qualitative research, they noted, has continued unabated since the early 1970s because broad changes in the economy such as public spending cuts and the retail sector overtaking manufacturing in importance "have fueled a need for research which is economical and quick and flexible to conduct. And which crucially gives answers."

So what's "new" about the "new qualitative research?" According to seminar convener Jetty Plasschaert, managing director of Holland's Intomart Qualitatief B.V., qualitative research on consumer behavior has always relied heavily on psychology and reflects the moving focus of attention in psychology. In the '50s, the focus was on the emotional and subconscious or unconscious processes within the individual, strongly anchored in early childhood and the small circle of family life. Later on, after a period of seeing the individual as mainly determined by the stimuli in his environment and conditioned through learning processes, the focus shifted to cognitive processes.

But now, as in psychology, many in market research are involved in a noncognitive revolution, shifting the focus back to the emotions and the unconscious.

According to Judie Lannon, research director at the London office of J. Walter Thompson Advertising Agency, the new qualitative research, by helping to improve advertising creativity, or aesthetics, has given British advertising a high appreciation rate--54 percent in a June 1984 survey "liked" or "quite liked" TV commercials and only 16 percent disapproved of them.

Other developments in qualitative research as a tool in marketing decision-making were discussed at the ESOMAR conference. The first session dealt with the new qualitative research--its basis, practice, perspectives, and limitations. Other sessions presented fascinating case studies where qualitative research methods were used to solve intriguing marketing problems. Texts of speeches given at the ESOMAR conference are available in a book of seminar proceedings from: ESOMAR, J.J. Viottastraat 29, 1071 JP Amsterdam (The Netherlands); telephone (020) 64.21.41: telex: 18535. •

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and 1969. This slowdown reflects the trend begun in the mid-1970s of decreasing migration to principal urban centers as a result of sluggish industrial growth. The government's decentralization policy contributed little to this trend; even today, industry is concentrated along the "old line of rail."

Kabwe is Zambia's most rapidly growing city registering an average annual growth rate of 7.3 percent between 1969 and 1980. Ndola and Kalulushi also are growing quickly. Growth in Chingola and Kitwe, which averaged over 8 percent annually between 1963 and 1968, has slowed somewhat in recent years.

Western Province, Luapula Province, and Northern Province bring up the rear with relatively slow growth rates. The latter two registered net population losses during the 1960s due to out-migration to Lusaka and the Copperbelt. This trend has abated somewhat, and, assisted by comparatively high fertility rates, growth rates have returned to positive levels of about 2 percent. Western Province and Northwestern Province also lost population due to out-migration, but their slow growth rates are largely due to lower than average birthrates. The only district in these two provinces registering an average annual negative growth rate between 1969 and 1980 was the Zambezi District (-0.5 percent).

### HOUSEHOLDS AND FAMILIES

As a result of the high growth rate, Zambia's population is young, with a median age of about 16.3 years. By the year 2000, the median age is expected to decline to 16 years.

Zambians under age 15 make up a whopping 47 percent of the total population; in contrast, those over age 65 make up only 2.7 percent of the total population. Therefore, Zambia's dependency ratio (the ratio of the economically dependent to the productive--those in the working ages of 15-64) is nearly one-to-one.

Traditional African values stress the importance of large families. Zambia's total fertility rate was 6.9 in 1985. According to the World Bank, only 1 percent of married women of childbearing age in 1982 used contraceptives.

However, a survey conducted in Lusaka in 1970 found urban women slightly more receptive to birth control, although still largely adhering to traditional values. Very few of the Lusaka women surveyed preferred fewer than 6 children. Only 13 percent of the women surveyed had some knowledge of family planning methods, only 11 percent approved of establishing family planning clinics, and a mere 3 percent actually used contraceptives. Family planning fared better among the upper classes, however. Fifty-two percent had some knowledge of family planning methods, 34 percent accepted establishing family planning clinics, and 28 percent were practicing some form of birth control. Yet, even among these groups, a minority preferred fewer than 5 children.

Zambia's low population density (7.5 people per square kilometer) has encouraged a pro-natalist attitude among government officials, although birth spacing has been recognized as a legitimate health measure. However, the lean economic years following the 1973 oil crisis have made government planners more receptive to deliberately reducing the birthrate.

Mean ages at first marriage were substantially lower for women than for men (18.4 and 24.4 respectively) in 1969. In 1985, 37 percent of women aged 15-19 were married. Only Asian women or those with more than 10 years of education tend to marry after their 20th birthdays. Polygamy, although officially outlawed, is practiced in about 5 percent of Zambian households. Most urban households are made up of nuclear families.

Marriage may be a given in Zambia, but divorce too has its place. Tribal customs often butt heads with city ways, especially when government policy reflects life in town rather than in the bush. Zambia's high divorce rate, especially in urban areas, is often in part blamed on the government disregarding the old tribal ways. Zambia's tribal groups, for example, are mostly matriarchal. After marriage, the husband moves in with his parents-in-law, while at the same time maintaining authority over his sister's children. His own children fall under the authority of their maternal uncle who lives away with his in-laws. The government, however, assumes that the lines of responsibility fall under Western nuclear-family traditions for families living in the cities. Such disruptions cause family tensions that lead to divorce.

Another cause of social instability is the migration of men to the cities, common since colonial times, for work in the mines. The male head of the family often works in the city, while his wife works in the fields and cares for the children hundreds of miles away. Principal in-migration areas--Central, Copperbelt, and Lusaka Provinces--tend therefore to have more men in the population than women, and the major out-migration areas--Eastern, Luapula, Northern, Northwestern, and Western Provinces--more women than men. The Copperbelt cities, especially Kitwe, Luanshya, and Ndola, have a particularly large male population. Migration, however, has abated somewhat in recent years, lessening the sharp imbalance registered in 1969 when males outnumbered females in both Copperbelt and Lusaka Provinces by nearly a two-to-one margin.

COMPARATIVELY SPEAKING

***Zambia is the third most urbanized country in mainland black Africa, with 41 percent of its 1980 population living in towns of more than 5,000 inhabitants.***

Illustration by Diana Souza

COMPARATIVELY SPEAKING

## HOUSING AND CONSTRUCTION

Traditional villages in Zambia differ for each tribe. Generally, villages are made up of clusters of rectangular houses with no strict division in compounds for each polygamous family, as is usual in West Africa. Housing data are hard to get. The latest nationwide survey--the 1969 census--estimated the total housing stock at 879,000. About 65 percent of the rural dwellings are built of local materials like sun-dried mud bricks or a grid of poles filled with *dagga* , a mixture of soil and natural materials.

The current number of urban homes is estimated at almost half a million. Ninety percent are built of such materials as bricks and concrete. In the 1974 sample census, 11 percent of urban homes, which accounted for 73 percent of all housing investments, were considered "high or medium cost"; 47 percent were "low cost." Thirty-seven percent were company housing units located along the "old line of rail." About 7 percent were constructed according to "site and service" schemes, in which only the land and basic infrastructure are provided to the occupant. The remaining 35 percent of urban housing stock consisted of servants' quarters and squatter settlements, which were legalized in 1975.

By 1984, squatter settlements represented an estimated 40 percent of all urban housing--over 50 percent in Lusaka City--and made up 60 percent of all newly constructed homes. In 1969, 73 percent of urban dwellings were considered overcrowded. Only 10 percent had more than three rooms. The average occupancy in 1974 amounted to 2.5 persons per room, or 6 per dwelling, varying from a low in Kafue City of just over 4 persons per dwelling to a high of nearly 8 per dwelling in Livingstone City. Current estimates show even higher figures.

Most rural dwellings (70 percent) use grass or thatch for roofing, while 50 percent of urban dwellings use asbestos and 33 percent corrugated iron. Grass or thatch, although requiring periodic replacement, keep dwellings reasonably cool. In 1974, half of urban and 4 percent of rural homes had running water. If shared water taps are included, these percentages rise to 82 percent of urban and 13 percent of rural homes. Access to electricity was limited to 41 percent of urban and 3 percent of rural dwellings.

## ETHNICITY AND RELIGION

Although tribal links are weakening, Zambia still counts 73 officially

**Administrative divisions of Zambia: populations, urbanization rates, population densities, and annual growth rates**

| *Provinces* | *Popuation in 1980* | *Urbanization Rate in 1980* | *Population Density in 1980* | *Annual Growth Rate 1969-80* | *Sex Ratio in 1980* |
|---|---|---|---|---|---|
| 1. Central | 513,835 | 35.6% | 14.0/sqm. | 3.3% | 1.015 |
| 2. Copperbelt | 1,248,888 | 92.0 | 103.4 | 3.9 | 1.060 |
| 3. Eastern | 656,381 | 9.0 | 24.7 | 2.3 | 0.888 |
| 4. Luapula | 412,798 | 15.9 | 21.0 | 1.9 | 0.913 |
| 5. Lusaka | 693,878 | 83.5 | 82.2 | 6.3 | 1.048 |
| 6. Northern | 677,894 | 17.4 | 11.9 | 2.0 | 0.891 |
| 7. North-Western | 301,677 | 12.6 | 6.1 | 2.4 | 0.913 |
| 8. Southern | 686,469 | 27.1 | 20.8 | 3.0 | 0.968 |
| 9. Western | 487,988 | 12.8 | 9.9 | 1.6 | 0.837 |
| *Large Urban Areas (LUA's)* | | | | | |
| 10. Chililabombwe | 61,928 | — | — | 3.0 | 1.060 |
| 11. Chingola | 145,869 | — | — | 3.2 | 1.059 |
| 12. Kabwe | 143,635 | — | — | 7.3 | 1.042 |
| 13. Kalulushi | 59,213 | — | — | 5.7 | 1.051 |
| 14. Kitwe | 314,794 | — | — | 4.2 | 1.071 |
| 15. Livingstone | 71,987 | — | — | 4.3 | 1.057 |
| 16. Luanshya | 132,164 | — | — | 2.9 | 1.081 |
| 17. Lusaka | 538,469 | — | — | 6.8 | 1.055 |
| 18. Mufulira | 149,778 | — | — | 3.0 | 1.057 |
| 19. Ndola | 282,439 | — | — | 5.3 | 1.069 |
| Total | 5,679,808 | 43.0 | 19.5 | 3.1 | 0.962 |

*Source: Central Statistical Office, 1980 Census of Population and Housing.*

recognized tribes. Together, they speak about 40 different dialects, all of the Bantu-language group. Although English is the official language, it is limited mostly to formal use. The 7 major tribal languages--Bemba (spoken by 19 percent of the population), Nyanja (also called Chewa, 11 percent), Tonga (11 percent), Lozi (6 percent), Kaonde (3 percent), Lunda (3 percent), and Luvale (2 percent)--are used in addition to English for radio broadcasts and other official purposes. Some of these languages, especially Nyanja (indigenous to Eastern Province) and Bemba (Northern Province) have spread as a result of internal migration and are now widely spoken outside their indigenous areas. The dominant tribal group--the Bemba--control Zambia's influential mineworkers' unions.

Apart from the indigenous population, there are about 67,000 residents of European descent, especially in Copperbelt Province where the mines still depend on some 4,000 highly skilled foreign professionals. In addition, there are roughly 16,000 Asians, mostly Indians, and about 7,000 persons of mixed descent. The major groups of foreign nationals, in order of importance, are the Malawians, Zimbabwans, British, and Tanzanians. About 20 percent of the population is Roman Catholic and 10 percent Protestant. The cultural importance of Christianity, however, exceeds its numerical weight. The remainder of the population adheres to traditional tribal religions.

## EDUCATION AND HEALTH

Zambia now apportions over 15 percent of its national budget to education. Since independence, school enrollment and literacy rates have improved dramatically. But, despite government efforts, the literacy rate still hovers around 50 percent.

In 1981, Zambia's 3,017 primary and secondary schools educated about 1.2 million students. Primary school enrollment increased from 53 percent of all children aged 7 to 13 in 1965 to 96 percent in 1980. At the secondary level, about 16 percent of the 14-to-18 age group was enrolled in 1980, up from 7 percent in 1963. Nearly twice as many men as women are enrolled in secondary school. In 1985, 22 percent of 12-to-17-year-old males were enrolled in school compared to 12 percent of females in the same age group.

Education up to the secondary school level is free, but the expenses incurred for uniforms and travel are serious obstacles for many families. Due to their relatively small number, about half of all secondary schools are boarding schools.

At the college level, enrollment rates drop to 2 percent even though Zambians view higher education not only as a gateway to white-collar employment but as an enhancement of personal status. The country's only university, the University of Zambia, is located in Lusaka, with additional campuses in Ndola and Solwezi. In 1982, its total enrollment was 4,088 students. Tuition varies from $125 to $1000 a year depending on the department and the student's nationality.

Despite some noticeable progress, the public health structure is still deficient. Principal health problems include malaria, tuberculosis, and, in Northern Province and Luapula Province, sleeping sickness and river blindness. Between 1965 and 1980, health services improved greatly with a decline of persons per physician from 11,390 to 7,670 (compared to 520 in the U.S.) and persons per nurse from 5,820 to 1,730 (compared to 140 in the U.S.). In 1977, each of Zambia's 82 hospitals (with up to 200 beds) was in most cases headed by a single physician and often run by a missionary organization. In addition, there were 1,004 health centers (with up to 20 beds) headed by medical assistants. Major cities have larger facilities, sometimes comparing favorably with European hospitals.

Zambia's lack of physicians poses an ongoing problem. At present, 80 percent of Zambia's doctors are foreigners, many of whom are leaving due to deteriorating salaries. Between 1983 and 1984 their numbers declined sharply from 686 to 487. Dentistry is practically nonexistent, with fewer than 100 dentists for the entire population.

Although health services are scarce, medical treatment is free for those who cannot afford to pay. In many cases, traditional remedies supplement modern medical treatment. In rural areas, women use midwives, rather than giving birth in health centers, largely from choice but also as a function of distance. One-third of rural Zambia lives more than 10 miles from a health center.

### ECONOMY, LABOR FORCE, AND INCOME

With a per capita GNP of $580 (1983), Zambia belongs to the richest half of African nations. However, since independence, its position has deteriorated largely as a result of weakening world prices for copper. The 60 percent decline in the per capita GNP since 1974 has caused a substantial increase in the foreign debt, despite the more than 50 percent cut in imports between 1973 and 1983. In 1983, Zambia owed $2.6 billion to foreign banks, or 84 percent of its 1983 GNP.

About two-thirds of Zambia's labor force, an estimated 2.2 million persons in 1982, still work in agriculture. Despite a growth rate of nearly 10 percent in 1984, the productivity of this sector is quite low. Agriculture still accounts for only 15 percent of the GNP, making it one of the lowest percentages anywhere in Africa. Agriculture remains largely underdeveloped while copper supports the economy and the government keeps food prices artificially low to assuage wage demands of urban workers.

In 1979, half of Zambia's commercial food production was controlled by about 1,000 wealthy

## TIPS ON TRENDS

### "Town within a town" concept boosts Japanese department-store sales

Look for a department store in Japan and you may find a town. Vast shopping centers, or "lifestyle playgrounds" as the Japanese call them, are Japan's latest answer to the slumping sales in the department-store industry.

Several of Japan's department-store conglomerates have opened "towns within towns" which incorporate numerous facilities for the general public such as churches, museums, banks, and sports clubs clustered around a major department store. So far, the new concept seems to be working. Seibu Saison Group's "Tsukashin Town," with Seibu Department Store at its center, draws an estimated 30,000 to 40,000 customers a day on weekdays and up to 70,000 on holidays. Sogo Group's "Minato Mirai 21," developed in conjunction with Yokohama redevelopment authorities, places the Yokohama Sogo Department Store at the heart of Yokohama's highly successful shopping-zone redevelopment project.

### Japan's "silver-market" alive and kicking

Catering to Japan's "Silver Generation" is becoming big business. Nearly 15 percent of Japan's total population is now over 60 years of age. Only 15 years from now, one out of every four persons in Japan will be a senior citizen.

Japanese firms offering health-care services, luxury travel tours, and financial management services are beginning to boom, and there's no end in sight. The $130 billion spent by the over-60 set in 1983 is expected to reach $800 billion by the year 2000.

Innovative new firms like Japan's Teishoku Company offer a "calorie-control service" delivering food items pegged to the customer's particular diet. Deliveries for diabetics and those with high blood pressure are in particular demand. Established businesses too are adding special services to meet the needs of Japan's affluent seniors. For only $133 a year, the Toyo Trust Bank offers unlimited financial consultations to seniors looking to invest their capital. According to the Statistics Bureau of Japan's Management and Coordination Agency, Toyo is on the right track. The average savings of a silver-generation household in 1984 was about $65,000, nearly 60 percent more than that of the average Japanese household.

American firms have already jumped in. Beverly Enterprise of California in conjunction with Japan's Shimizu Construction Company plan to offer a consultancy service for the care of the elderly. Manor Care of Maryland is now conducting market research in Japan.

The never-far-behind Japanese government already has set up a "Silver" Service Promotion and Guidance Unit in its Ministry of Health and Welfare specifically to promote participation by the private sector in developing services for the elderly.

### West Germans spend record sum on research

West German business spent about $12 billion in 1985, up from $10 billion in 1984. This record sum was further augmented by the nearly $17 billion spent by universities and research institutes. West Germany's total expenditure on research was nearly 3 percent of its gross national product–close to the proportion of the gross national product spent individually by Japan and the U.S. Dollar for dollar, however, the U.S. spent six times as much as the Federal Republic. Japan spent twice as much. •

farmers--mostly of European descent--who own most of the "Crownland," or the fertile stretches of land along the central railroad. Another 30,000 "emergent farmers" produce cash crops, whereas the remaining 600,000 "peasant farmers" consume most of what they produce. About 43 percent of all farms have fewer than 2.5 acres.

Despite the more than $20 million invested in agricultural development projects since 1975, per capita food production decreased by 26 percent in the last two decades largely because production could not keep up with burgeoning population growth. Total production grew 1.4 percent annually between 1973 and 1983 while Zambia's population growth sped along at 3.1 percent annually. Cooperatives formed in the mid-1970s to supplement large commercial farms and reduce food imports were barely self-sufficient by the late 1970s. In 1979, they suffered severe crop failures which led to massive food shortages. As a result, cereal imports and food aid in cereals increased from a total of 94,000 metric tons in 1974 to 330,000 in 1983. Zambia now imports 25 percent of its food.

The growth of the manufacturing sector, which now employs about 11 percent of the working population and accounts for 18 percent of the GNP, has been slightly faster (2.5 percent annually) but still less than population growth. Most of Zambia's industrial production is for local use. Trade and industry are for the most part under the wing of the Zambia Industrial and Mining Corporation (ZIMCO), a holding of the Industrial Development Corporation (INDECO)--the largest corporation in independent Africa. After the Mulungushi Reform of 1968, INDECO gained a majority interest in about one-third of Zambia's major industries and control of Zambia's insurance and construction companies. Commerce, transportation, and the service sector absorb the remaining 22 percent of the working population.

Although women make up 32 percent of the labor force, female labor force participation is lower in Zambia than in many West African and East African coastal countries where women work in local markets selling produce. Zambia lacks a local-market tradition.

Urban wages in Zambia are higher than in surrounding countries mainly due to the relative prosperity of the copper industry. However, stagnating growth in the urban job market turns many qualified new entrants away--the 375,000 new jobs available in 1980 were about the same number available 10 years prior. Consequently, Zambia's income distribution is one of the most unequal in the world. In 1976, the poorest 60 percent of the population accounted for only 22 percent of total income; the top 10 percent of the population, 46 percent of total income.

COMPARATIVELY SPEAKING

***In 1985, Zambia's per capita GNP was $580, compared to an average of $300 for all of Eastern Africa.***

COMPARATIVELY SPEAKING

Illustration by Diana Souza

CONSUMPTION, TRANSPORT, AND COMMUNICATION

The typical Zambian diet consists of a maize porridge with vegetables and fried fish. Beef is a part of the daily diet in cattle-raising country--Western, Southern, and Eastern Provinces. Traditionally, Zambians eat only two meals a day--between 10 a.m. and 11 a.m. and between 4 p.m. and 5 p.m.-- supplemented by snacking on fruits, nuts, roasted manioc, or sugarcane while working in the fields. The local beer, a brew derived from millet, provides supplemental minerals and vitamins. Tradition, however, prohibits pregnant women from drinking beer or eating eggs. In 1982, the mean daily calorie intake was only 2,054 calories, 11 percent below the level recommended by the World Bank.

Urban Zambians take pride in what is considered "smart dress"--a Western-style jacket, shirt, and tie for men, and a modern dress covering the knees for women. Once worn by expatriates or wealthy Zambians, second-hand Western clothes are sold to the less fortunate. Western clothes are so highly valued that in the more remote regions they are preferred over money as a means of exchange. The traditional bark-cloth, similar to felt, has almost disappeared.

Because Zambia lacks a local-market tradition, markets are only found in the largest cities and district capitals. Sometimes a "European" market coexists with an "African" market and sells local foodstuffs, such as mango, papaya, guava, oranges, bananas, tomatoes, beans, ground nuts, corn, eggplant, onions, and potatoes, next to imported clothes, transistor radios, watches, and kitchen utensils. The "African" markets tend to sell a larger variety of food and consumer articles of generally lower quality.

Although per capita energy consumption in Zambia is only 6.1 percent of what it is in the United States, Zambians use somewhat more than most of their African neighbors. Moreover, energy is one of the few economic sectors where the growth of production has exceeded the growth of consumption in recent years (6.4 percent versus 1.9 percent annually between 1973 and 1983). Zambia now even exports energy to Zaire and Zimbabwe. However, Zambia still relies heavily on imported oil, which went from 10 percent of total import value in 1973 to 19 percent in 1983.

Zambia's 806 miles of railroads are of vital importance to the country. The Tanzam Railway, built with assistance from the People's Republic of China and completed in 1975, alleviated some of Zambia's transportation problems but fell short of expected goals due to a lack of spare parts and maintenance, financial problems, limited harbor capacity at Dar-es-Salaam, and bomb attacks by Southern Rhodesian terrorists. The Tanzam Railway, which runs from the small town of Napiri Mpolshi along the old colonial line of rail to the port of Dar-es-Salaam, is due to have a second track added to further ease the flow of traffic.

Zambia's roughly 23,000 miles of roads service 135,000 motor vehicles, of which 67,500 were private cars in 1981. Normally, any part of the country can be reached from Lusaka within a day. The most important roads are the Great North Road, running from Livingstone via Lusaka and Mpika to Turduma on the Tanzanian border; the Great East Road, running from Lusaka to Chipata and the Malawian Border; and the Zairean Border Road, running from Kapir Mposhi to Lumumbashi in Zaire. These roads and the ones to Mongu in the west and Mpulengu in the north are tarred. The 20,000 miles of rural access roads, or "dirt roads," are virtually inaccessible in the rainy season.

Mail and bus services are considered reasonable by African standards. Long distance public transportation is by bus. Within the cities, wealthy Zambians own cars, but the majority of the population simply walks or hitchhikes. Truck drivers often reduce travel costs by letting paying hitchhikers sit in the back of their trucks. The Zambia Airways Corporation, run by Alitalia until 1976, now provides internal as well as international air services, including a nonstop flight from Lusaka to London.

In 1984, Zambia had an estimated 1 million radios and nearly a quarter million television sets. The five radio and two television stations broadcast 60 percent of the time in the 7 major tribal languages. There were 77,400 telephones in 1979.

The two major newspapers--the *Zambia Daily*, published by the government in Lusaka, and the *Times of Zambia*, the UNIP newspaper published in Ndola--together have a circulation of 20 copies per 1,000 inhabitants. The Zambia Information Service distributes provincial newspapers in such tribal languages as Nyanja. Other printed media include journals such as *The Miner*, *Roan Antilope*, *Zambia Farmer*, *Livingstone Mail*, and *The Sunday Times*.

### SOURCES OF INFORMATION

Reports from the 1980 census can be obtained from the Central Statistics Office of Zambia, POB 31908, Lusaka. This agency also publishes other statistical reports at irregular intervals. A quite comprehensive but somewhat outdated analysis of Zambia's population, *The Population of Zambia*, by Patrick O. Ohadike and Habtemariam Tesfaghiorghis, was published in 1975 in the CICRED Monograph Series. Other works of general interest include A. Roberts' *A History of Zambia* (London, 1976), A. Turok's *Development in Zambia* (London, 1979), and the classic *Zambia* by Richard Hall, published in 1965 by the Pall Mall Press, also in London. Another useful source of information is the Third National Development Plan (1979-83), published in Lusaka in 1979.

Articles on specific issues relevant to Zambia can be found in *The Zambian Journal of Contemporary Issues* and *The Quarterly Economic Review of Zambia*. In addition, *The African International Business, Economic and Political Monthly*, 54 A Tottenham Court Road, London W1 WI P OBT, regularly provides up-to-date information on Zambia and other African countries. The ILO issued a report on Zambia in 1981, entitled "Zambia: basic needs in an economy under pressure," published in Addis Ababa. A comparison between the industrial policies of Kenya, Tanzania, and Zambia was the object of a World Bank Study published in 1981 as World Bank Staff Paper no. 457.

Other data can be found in various handbooks, such as the *UN Demographic Yearbook*, the World Bank's annual *World Development Report*, and the annual *Africa South of the Sahara*, published by Europa Publishing, Ltd. in London. World Bank publications can be obtained from The World Bank, 1818 H Street, N.W., Washington, DC 20433. •

*--Ralph Hakkert and Roel Wieringa*

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## CONFERENCES

**The 41st annual Cleveland World Trade Conference will be held on May 22. The theme of the conference is "Strategies for Global Survival."**

**Four concurrent morning sessions will follow the keynote address. The four morning seminars are entitled: the mystery of international trade made easy; international marketing--fighting back will work; technology--reinventing corporate technology; and keeping tabs on global competition.**

**The four concurrent afternoon sessions are entitled: focus on regional and country areas--intelligence work pays off; creative marketing tactics; new horizons and case studies in technology; and advanced variations in international trade.**

**For more information and registration materials, contact the Cleveland World Trade Association, 690 Huntington Building, Cleveland, Ohio 44115; telephone (216) 621-3300.** •

# REGIONS

## *EUROPE*

### West Germany

Experts are beginning to wonder how low can it go. The French demography journal, *Population*, reports that the West German total fertility rate fell to 1.27 children per woman in 1984, down from an already low 1.32 children per woman in 1983.

### Italy

As did school children in most member states of the European Community, the number of school children in Italy continued to decrease in the 1983-84 school year due to the fall in the birthrate.

Kindergarten and preschool class enrollment fell 4.5 percent, primary school enrollment by 3.5 percent, and *scuola media* (an intermediate three-year phase that follows the primary stage) enrollment by 1.4 percent.

School enrollment in Secondary Level 1, however, increased by 1.7 percent, largely due to students remaining in school to take short vocational training courses. Vocational courses offer prospective job seekers added credentials for the difficult-to-enter Italian job market.

Italy's job market for young people is brutally competitive. Seventy-six percent of those seeking work in 1985 (1.7 million people) were between the ages of 14 and 29. It takes an average of 15 months to find work. Over half of all unemployed Italians are youths between 14 and 29, 90 percent of whom are trying to find work for the first time.

## *SOUTH AMERICA*

### Brazil

Brazil's progress in accepting family planning has led to a reduction in the population growth rate from 3 percent annually between 1955 and 1965 to 2.3 percent in 1985. Although Brazil has no national population program, state and local government programs have been highly successful, especially with Brazil's educated classes. The strong support of the private sector--physicians, pharmacists, and the private family planning organization Sociedade Civil de Bem-Estar Familiar No Brasil (BEMFAM)--is an important factor in Brazil's success.

Of those practising family planning in 1980--mostly Brazil's middle and upper classes--42 percent chose the pill, 38 percent used voluntary sterilization, 12 percent coitus interruptus, and 8 percent natural methods. The challenge of spreading family planning practice to Brazil's vast city slums and large rural areas lies ahead.

Some inroads have already been made. In 1979, BEMFAM found that even in the poor northeast state of Piaui, 31 percent of women were practising family planning. In addition, Gallup surveys of public opinion show increased interest in slowing population growth. Seventy-one percent of those polled in 1981 thought that fewer children should be born, up from 46 percent in 1967. And 82 percent of those polled in Sao Paulo thought 2 to 3 children was an ideal number, up from 68 percent in 1972.

Two other factors add hope to Brazil's fight to slow its population growth--the prevalence of media access and of contraceptives themselves. A large proportion of Brazil's population has access to the media and therefore to family planning broadcasts. As early as 1976, 76 percent of homes had radios and 47 percent had TVs. Even in the poor northeast, 52 percent had radios. Not surprisingly, considering that Brazil is the world's fourth largest producer of contraceptives, contraceptive prevalence surveys in Brazil show an unusually high prevalence rate of 61 percent.

## *MIDDLE EAST*

### Turkey

Unwanted pregnancies are a growing problem in Turkey. The percentage of married women below age 45 who have undergone at least one abortion has increased from 8 percent in 1963 to 20 percent today.

Each year an estimated 500,000 Turkish women obtain legal abortions. A 1983 law legalized abortion. However, Turkish authorities do not view abortion as an alternative to contraception and are expanding family planning services. By 1981, 4 million people had already been educated in family planning methods ●

# PUBLICATIONS

**Postcensal Annual Estimates of Population by Marital Status, Age, Sex and Components of Growth for Canada and the Provinces,** June 1, 1985, vol. 3. Ottawa: Statistics Canada, 1986, 102 pp., $22.00 in Canada; $23.00 elsewhere. Order from Statistics Canada, Publications Sales and Services, Ottawa K1A OT6, Canada. For credit card orders, call (613) 973-8018.

The June 3 census is unlikely to produce any surprises because Canadian statisticians are so good at producing fresh estimates each year. This volume, for example, explains what happened to Canada's population growth between 1984 and 1985 and how age distribution, marital status, immigration, and emigration have changed.

Canada's population continues to age. The group aged 0 to 17 has decreased slightly from 26.3 percent of the population in 1984 to 26 percent in 1985, while the adult and elderly age groups have increased by about .1 percentage points each.

**China Urban Statistics 1985,** compiled by State Statistical Bureau, People's Republic of China, London: Longman Group and China Statistical Information and Consultancy Service Centre, 1985 703 pp., $120. Order from Gale Research Company, Book Tower, Detroit, MI 48226; telephone (313) 961-2242.

By the end of 1984, China had about 300 cities serving as political, economic, and cultural centers. Many are now working out a strategy of economic development with plans that include opening their doors to the outside world.

Information about China's cities is given in three sections in this first edition of *China Urban Statistics*. The first section provides general information about China's inland cities with populations of more than 1 million, coastal ports, special economic zones, and Hainan Island. Textual information is provided on each city's geography, history, economic development, urban development, social development, places of interest, and development prospects.

The second section is a statistical survey with data from 295 cities. Included are the names and populations of cities and counties, proportion urban and rural, population density by county and city. For each city and county, there is also information on such items as the number of telephones, the number of post offices, number and enrollment of schools at various levels, the number of theaters, cinemas, libraries and books in libraries, the number of clinics and hospitals, the number of people engaged in various occupations including retailing, catering, tourism, agriculture, and the floor space of residential buildings. Information is also given on public utilities and government expenditures on specific functions.

The third section is an appendix with information on weights and measures and a glossary of city names in English and Chinese.

**Estimates and Projections of Urban, Rural and City Populations, 1950-2025: The 1982 Assessment,** 1985, New York: The United Nations, 148 pp. Order from Publications Sales, United Nations, New York, NY 10017.

A prime question for any overseas market researcher is what cities should be the focus of attention. This publication gives guidance on the size of cities and how large they are likely to become. This publication analyzes urban growth throughout the world and projects how urbanized each country will become in the next 40 years. Also provided are projections for the 35 largest cities in the world from now until 2000. A discussion of these new projections was published in *International Demographics* in March 1985.

**Statistical Indicators on Youth,** 1985, New York: United Nations, $15.50. Available in English and French. Order from Publications Sales, United Nations, New York, NY 10017.

This statistical reference book presents 41 indicators on youth for 172 countries and areas in a pocketbook format, with accompanying notes on statistical methods and sources. The indicators are in the fields of population, education and literacy, labor force and agriculture, marital statistics, fertility, life expectancy, and causes of death. The compilation is based on a microcomputer data base and was prepared with financial support from Soka Gakkai, a nonprofit organization in Japan. A wall chart summarizing this volume is also available from the same address for $3.00.

**World Health Statistics Annual,** 1985, Geneva, Switzerland: World Health Organization, 519 pps., 85 Sw. Fr. Order from WHO Publications Center USA, 49 Sheridan Avenue, Albany, NY 12210.

If you need country-by-country data on causes of death for infants or adults, or on the state of water and sanitation, this volume is for you. There are also country-by-country vital statistics and life tables that provide data on life expectancy, number of survivors, and chances per 1,000 of death from specific causes.

## COMING UP

**The Ottawa-Hull Metropolitan Area: As Canada's capital, Ottawa's main business is government.**

**Do's and don'ts of multilingual copy adaption.**

**FEATURE**

# Gray Australians Overlooked by Marketers

Surfers are not alone when it comes to partaking of the fabled good life in Australia. A recent study of Australia's aged contradicts the widely held view among younger Australians that senior citizens are a drain on the nation's social services and economy in general.

Rather, a 1985 survey of Australians 50-years-old and above, the Grey Growth Survey, found participants in generally good health and active, with equal or higher financial status and higher per capita disposable income than the national average, and with good self-images and positive attitudes towards their lifestyles below the equator.

What's more, marketers of consumer goods and services have largely ignored this potentially lucrative and expanding aged market. The Australian Bureau of Statistics projects a 1986 population of 2.2 million 50-to-64-year-olds and 1.9 million over-65-year-olds. One in four Australians now fall in the 50-and-over category. One in eight Australians is over 65. Those 50 and above in Australia spend more than $9 billion annually on goods and services.

As in other developed countries, the portion of the population aged 50 and over in Australia is expected to continue expanding as the substantial numbers of baby boomers move into the upper-age categories , the number of births decline, and life expectancy improves as a result of the falling death rate. Substantial levels of immigration, however, have had the effect of reducing the proportion of the population in elderly groups to levels below what it would otherwise have been.

The Grey Growth Survey found that of those aged 50 to 64, more than 30 percent have incomes of at least $18,000, compared with Australia's average household income in 1985 of $20,500. However, only 4 percent of retired persons over 50 have incomes of more than $18,000.

Those in the 50-to-64-year-old age group are more inclined to purchase nonessential and luxury goods than those in the over-65 group as most are still in the workforce and therefore have larger incomes than those over 65, most of whom are retired.

However, as a total group, those over 50 have higher disposable incomes proportionately than other age groups. Over 68 percent of the over 50s own their own home outright with 78 percent living in single detached houses. Freed of mortgage payments and support of dependents, Australia's aged have more discretionary income at their disposal than their younger counterparts.

In 1985, 50-to-64-year-olds most often purchased home furnishings, cars, microwave ovens, and VCRs. For those over 65, home appliances such as air conditioners, refrigerators, washing machines, and clothes dryers were popular purchases. An estimated $3 billion was spent by over-50 Australians on consumer durables alone in 1985.

The Grey Growth Survey also found that contrary to the prevailing picture of those over 50, more than 85 percent of the over-50 set lead totally independent lives.

The fiscal and physical well-being of the post-50 set is reflected in a widespread trend toward early retirement. About 70,000 Australians retire each year. Nearly half of Australia's population above 45 has left the work force according to recent government figures. Australia's retirement age is 65 for men and 60 for women. Forty-four percent of Grey Growth participants had reached retirement age. A full third of all retirees had retired before they reached 60.

Retirees who participated in the Grey Growth Survey described themselves as useful, content, active, free, doing their own thing, and generous. Australia's aged tend to be very sociable. Seventy-seven percent of Grey Growth participants were members of at least one sport, service, or social club, and 50 percent of people over 65 were members of two or more clubs or organizations. The most popular sport clubs included those offering bowling or golfing, followed by those providing walking, fishing, or cycling, and outdoor racquet sports. Grey Australians also make good use of public facilities and services as libraries, parks, recreation areas, and educational courses.

Older Australians may still be up and around, but market researchers have largely acted as if this group was already asleep. Research data on the older consumer in Australia is sorely lacking, according to Tony Hardingham, director of Jordan Hardingham, Pty., Ltd., the agency that commissioned the Grey Growth Survey.

Grey Growth was based on nearly 1,000 householder interviews of persons above 50 living in the state capitals of Sydney, Melbourne, Brisbane, Adelaide, and Perth. It contains a 60-page analysis of survey findings and 350 pages of tables. Copies can be obtained for $900 from Jordan Hardingham, Pty., Ltd., Riley House, 164a Campbell St., Surry Hills, NSW, 2010, Australia; telephone (02) 211-2144; fax (02) 211-4531.

*--Peter Inserra*

International Demographics
P.O. BOX 68, ITHACA, N.Y. 14851

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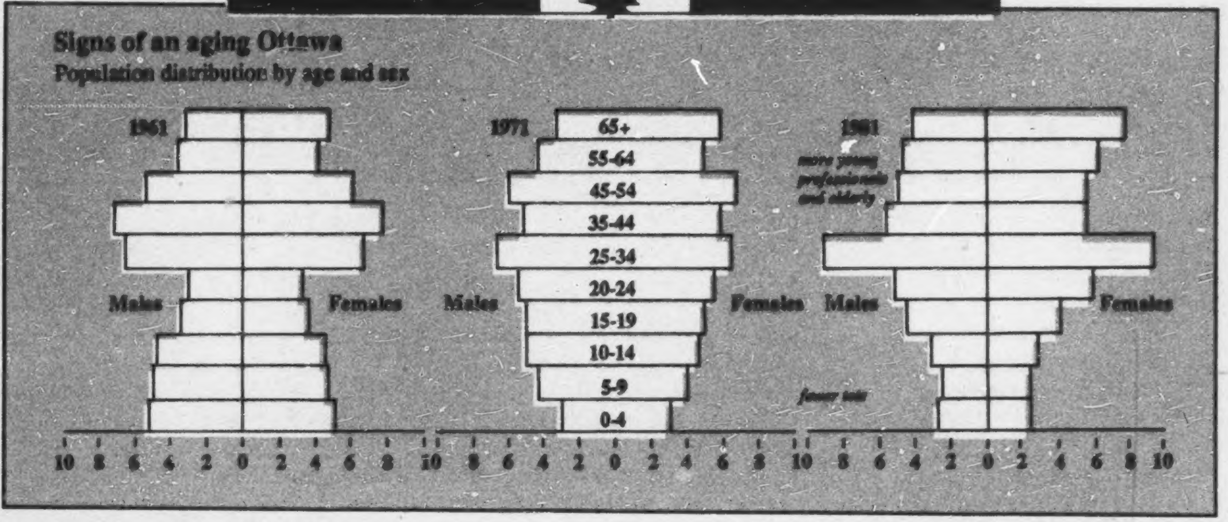
CONSUMER TRENDS AND MARKETS ABROAD
JUNE 1986 VOLUME 5, NUMBER 6

# International Demographics



Signs of an aging Ottawa
Population distribution by age and sex

AREA PROFILE

## The City of Ottawa

As Canada's capital, Ottawa's main business is government. As in Washington, D.C., little industry exists. Ottawa's diplomatic community maintains 88 resident missions in the city, although only those of the U.S., U.K., U.S.S.R., France, West Germany, and the People's Republic of China are considerable in size. Most Ottawa residents are of British or French descent, with most francophones (35 percent of the population) also fluent in English. Small Lebanese, Portuguese, and Italian colonies and about 12,000 Americans add to the city's diversity.

The City of Ottawa is a low-density residential community with an abundance of open space. The significant amount of landscaped public open space, considerable water area of the two major rivers and the Rideau Canal, and large tracts of federally owned lands--presently vacant or used for leisure activities--make Ottawa a sports addict's dream.

In winter, cross-country and downhill skiing is popular in and around Ottawa. Gatineau Park--one of Canada's largest ski complexes--is only a 40-minute drive from Ottawa. And Ottawa's Carlington Park offers skiing within city limits. A 5-mile stretch of the Rideau Canal--kept cleared and partially lighted--provides outdoor ice skating. Warming huts and snack bars add to its ambiance.

In summer, water sports on the Ottawa, Rideau, and Gatineau Rivers and nearby lakes keep Ottawa residents active. Yacht clubs offer extensive sailing programs. Bicycling and jogging are popular during summer on trails designed for these purposes. Designated roads are closed on Sundays for the use of hikers, joggers, and cyclists.

All-season facilities for sports including ice skating arenas, curling rinks, bowling alleys, indoor and outdoor swimming pools, and tennis and squash courts abound. The

*continued*

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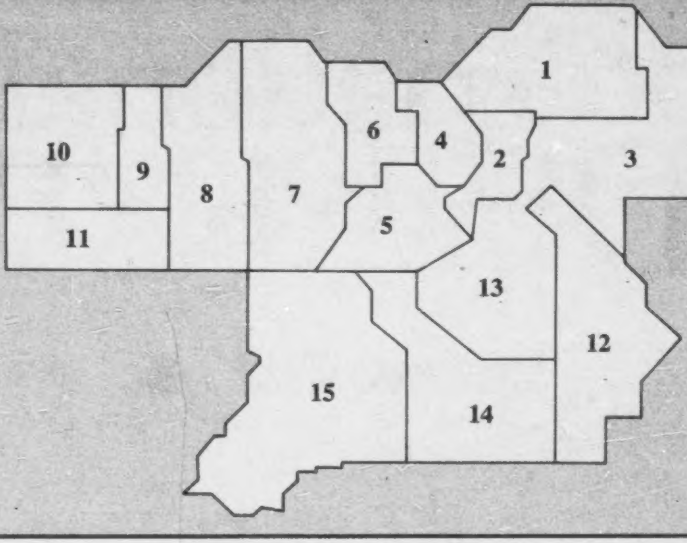
THIS MONTH: OTTAWA

**Ottawa Population by Ward: 1983**

| Ward | Number | Percent |
|---|---|---|
| 1 By-Rideau | 22,380 | 7.3% |
| 2 St. Georges | 19,219 | 6.3 |
| 3 Overbrook-Forbes | 23,041 | 7.6 |
| 4 Wellington | 16,405 | 5.4 |
| 5 Capital | 18,686 | 6.1 |
| 6 Dalhousie | 20,098 | 6.6 |
| 7 Elmdale | 16,275 | 5.3 |
| 8 Queensboro | 23,163 | 7.6 |
| 9 Richmond | 19,627 | 6.4 |
| 10 Britannia | 16,930 | 5.6 |
| 11 Carleton | 20,321 | 6.7 |
| 12 Canterbury | 21,471 | 7.0 |
| 13 Alta Vista | 20,912 | 6.9 |
| 14 Billings | 19,111 | 6.3 |
| 15 Riverside | 27,137 | 8.9 |
| City Total | 304,776 | 100.0 |



Nepean Sportsplex, located in West Ottawa, houses an ice skating rink, hockey arena, curling rink, gymnasium, squash courts, indoor swimming pool, auditorium, sauna, pub, and restaurant all under one roof. Ottawa residents are avid hunters and fishermen. Private hunting and fishing clubs are common.

### OTTAWA DRIVES NATIONAL CAPITAL ECONOMIC AREA

As for most cities at the hub of large urban areas, Ottawa taken alone is not the whole story. Ottawa is the central city of the National Capital Area (population, 780,000), a geographic area consisting of the Ottawa-Carleton Region, the Outaouais Region, and towns and villages within a radius of about 50 kilometers from the center of Ottawa (see map on page 6). Many satellite communities ring Ottawa. They lie to the south of the city outside the boundaries of the Greenbelt--green open space created by the federal government in the 1950s--and to the north of the city beyond the Ottawa River. The Ottawa River divides the greater Hull area from the city proper and also forms the boundary separating Quebec Province from Ontario Province. For the purposes of the census, Statistics Canada defined an area called the Ottawa-Hull Census Metropolitan Area, which is roughly equivalent to the National Capital Area except for some rural towns and villages and the Township of West Carleton. The City of Ottawa proper is broken up into 15 wards for administrative purposes.

### MIGRATION REVERSES POPULATION DECLINE

The unprecedented development boom in the City of Ottawa's industrial, commercial, and residential sectors since 1981 reversed the city's declining population trend (begun in 1976) and slowed the continuous loss of inner-city residents to suburban neighborhoods and new communities outside the city. Accordingly, the city's population grew, although negligibly, from about 302,400 in 1971 to 304,800 in 1984. Counting foreign diplomats and their families, the actual resident population in 1984 was nearer 315,000.

Historically, about 60 percent of the city's average annual population growth has been from employment-induced migration, with the balance from the excess of live births over deaths. Due to the professional and service nature of most jobs in the City of Ottawa, growth in the age group 25 to 44 since 1963 has been significant. Over 50 percent of in-migrants are between ages16 and 44. As most in-migrants have dependents, about 24 percent of in-migrants are in the 0-15 age group.

The City of Ottawa is the major municipality in terms of commercial and industrial development within the National Capital Area. Of the approximately 380,000 total jobs in this area, an estimated 222,000 or about 58 percent are located within the city's limits. Office employment is dominant, with two-thirds of all jobs office-based. The federal government is Ottawa's major employer. About 40 percent of all jobs are civil service, with another 45 percent in the service sector either directly or indirectly dependent on federal government employment. Only 15 percent of jobs are independent of the federal government's influence.

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## A TOP-HEAVY POPULATION

Most large urban centers within greater economic areas tend to attract particular groups of people resulting in demographic profiles significantly different from surrounding satellite communities. Ottawa's population is skewed toward an older population because professionals migrate to the city for work and do not leave as they age.

In 1961, only 6 percent of Ottawa's total population was over 65. By 1981 this share had increased to over 8 percent. By 2001, this percentage is projected to jump to 20 percent of the total population. Middle-age population groups will continue to grow, raising the average age for the entire population. By 2001, one in ten Ottawans will be between 55 and 65 years of age. Two out of ten will be over 65. At the opposite end, children in the 0-4 age group will continue to decline in both actual number and in their share of the population. In 1961, almost 11 percent of the total population was less than 5 years old; in 1981, they were under 5 percent.

With more singles, middle-aged, and senior citizens, the City of Ottawa presents abundant opportunities for expansion in rapid transit, daycare, educational, and institutional services. Ottawa's market turns over quickly since many population groups are transient and generally live less than three years in one location or municipality.

## HOUSEHOLDS AND HOUSING

Although Ottawa's population declined from 1961 to 1981, the total number of households grew at about 4 percent annually (or 2,575 households a year) between 1961 and 1981. The growth of one- and two-person households for the same period was at much higher rates--nearly three times greater than in all households combined, with a corresponding dip in the number of three-or-more-person households. The growth of one- and two-person households was particularly rapid in the 1971-81 period. By 1981, almost two out of every three households consisted of only one or two persons, up from about one in three in 1961.

This trend toward small household formation is expected to continue with the traditional family (husband, wife, with one or more children) taking more and more of a minority position. Single-parent families (one parent and one or more children under age 18) are also on the rise, with Ottawa's share of these families growing with more than 50 percent of the 28,000 single-parent families in the Capital Area living in Ottawa in 1984.

As the total number of households grew at rapid rates, the average household size declined from 3.2 in 1971 to an estimated 2.2 in 1984. Household size is expected to become smaller, declining to between 1.8 and 2.

There are approximately 147,100 dwelling units in the City of Ottawa of which 12,000 are nonconventional (institutional residences, group homes, university dormitories, and regular hotels and motels). The gross density is 5.4 units per acre. However, a more realistic density figure, given the thousands of acres of government-owned public and open space lands, is based only upon lands where residential development is permitted, or an average of 15.6 units per acre.

About one-half of all dwelling units in Ottawa are low density--single detached, semi-detached, duplex, triplex, row dwellings and apartment dwellings with less than 10 units per building--housing 64 percent of Ottawa's resident population. Elmdale and Capital Wards have the highest percentages of low-density units with 76 percent and 74 percent respectively. Wellington and By-Rideau Wards, on the other hand, have the lowest percentages of low-density units with 23 percent and 38 percent respectively. Billings and Britannia Wards have the highest percentage of high-density units with 54 percent and 52 percent respectively, while Capital and Elmdale Wards have the lowest percentages with 10 percent and 13 percent respectively.

Wellington, By-Rideau, and Queensboro Wards have the largest numbers of residential units, while Elmdale, Billings, and Capital Wards have the smallest. Wellington, Dalhousie, and St. George's Wards, with average densities of about 67, 44, and 26 units per acre respectively, are the most densely developed wards; Riverside, Alta Vista, and Carleton, with about 8, 10, and 12 units per acre respectively, the least densely developed wards.

**Resident population of the City of Ottawa by age and sex: 1983**

| *Age* | *Total* | *Male* | *Female* |
|---|---|---|---|
| 0-4 | 8,318 | 4,245 | 4,073 |
| 5-9 | 14,368 | 7,314 | 7,054 |
| 10-14 | 15,637 | 7,983 | 7,654 |
| 15-19 | 18,461 | 9,343 | 9,115 |
| 20-24 | 33,936 | 16,379 | 17,557 |
| 25-29 | 32,448 | 15,792 | 16,656 |
| 30-34 | 26,368 | 12,939 | 13,429 |
| 35-39 | 21,772 | 10,779 | 10,993 |
| 40-44 | 15,848 | 7,535 | 8,313 |
| 45-49 | 14,005 | 6,684 | 7,321 |
| 50-54 | 14,719 | 7,063 | 7,656 |
| 55-59 | 15,609 | 7,165 | 8,444 |
| 60-64 | 16,560 | 7,352 | 9,208 |
| 65-69 | 13,159 | 5,634 | 7,525 |
| 70-74 | 11,092 | 4,437 | 6,655 |
| 75-79 | 7,579 | 2,680 | 4,899 |
| 80+ | 10,082 | 2,913 | 7,169 |
| Unknown | 10,383 | 3,157 | 7,226 |
| All ages | 304,776 | 143,913 | 160,863 |

## TIPS ON TRENDS

### Britain's working families move up

Working families in Britain have never had it better, according to the 1986 edition of *Social Trends*. Fifty-five percent of all families with a head aged 25 to 29 and 69 percent of all with a head aged 30 to 44 are buying or already own their homes.

Even holidays abroad are now within reach of the average manual worker. In 1984, 16 million Britains took a holiday abroad, a third of them in Spain. Manual workers in Britain routinely receive 4 weeks of paid vacation a year. Roughly 19 percent receive 5 weeks or more of paid holiday.

### Asia on the rise

Despite slowing economic growth in Asia, eight Asian countries placed among the top ten nations with the highest growth rates for the period between 1981 and 1985. All eight grew at an average annual rate of at least 6 percent.

Only Oman outpaced number two Singapore, number three Taiwan, and number four China. Pakistan came in fifth, followed by Cameroon (sixth), Malaysia (seventh), Indonesia (eighth), Hong Kong (ninth), and Gabon(tenth).

The source of these statistics is the *Country Database Quarterly*, Frost and Sullivan, Inc., February 1986.

### Japan

Tokyoites like Miyake designs, the best sushi, and elaborate weekends in Western-style ski resorts. But they like "down home" too, with more and more of them hungering for a little hometown cooking and hands-on farming.

Japan's booming "hometown movement" is taking increasing numbers of urbanites back to their roots. So far 206 honorary villager programs in 41 prefectures offer mail-order sales of local products; ownership of forest land, farms, cattle, and other properties; home-stays and hands-on farming experiences; and discounts for lodging and the use of sports facilities.

Riverside Ward houses the largest portion of the city's population (about 9 percent) with just over 27,000 people in 1983; Wellington Ward, the smallest (about 5 percent) with 16,405 people.

Generally, families occupy single and semi-detached dwellings, duplexes, triplexes, or row housing. The majority of Ottawa's housing stock in 1984 was rental property (about 61 percent). In Wellington Ward, only 10 percent of all units were owner-occupied. Other wards with a high percentage of rental units are By-Rideau (76 percent), St. George's (74 percent), Dalhousie and Britannia Wards (70 percent each). Wards with more than 50 percent owner-occupied dwellings include Riverside, Richmond, Carleton, Capital, and Alta Vista Wards.

#### GOING SHOPPING

Ottawans like shopping indoors. By 1984, the city counted 69 shopping centers with over 4 million square feet of floor space. And even more than shopping centers, Ottawans like complexes--mini-cities within cities with everything under one roof. Ottawa's largest shopping center, the Rideau Center, is part of a larger complex housing a hotel, convention center, and a walkway to other retail facilities on Rideau Street.

When forced to shop outdoors, Ottawans can visit any of ten commercial strips. Bank Street--the most highly developed strip for retail shopping--offers passersby not only restaurants and furniture stores but neighborhood specialty shops, antique stores, repair stores, and service outlets. Carling Avenue, on the other hand, is highly commercial with office buildings, computer outlets, and automobile repair shops. Somerset Street is old and established with auto mechanic shops, other repair stores, as well as ethnic restaurants and food stores. Several blocks between Metcalfe and Kent Streets offer gentrified bars, restaurants, and boutiques catering to young urban professionals. Renovation is moving further west with buildings being brought back to their original rich architectural styles. The Elgin Street Strip is short but popular, especially at night. Dominated by restaurants, it is surrounded by residential development and enjoys a high walk-in trade. Diners and shoppers browse at night, stopping in at ethnic and Canadian restaurants.

Wellington Ward and By-Rideau Ward have the highest shares of retail development, accounting for 17 percent and 12 percent respectively. Retail development is low in Alta Vista, Riverside, Canterbury,

**Household income distribution in Ottawa-Hull, 1980**

| *Income Class* | *Households* | |
|---|---|---|
| | *No.* | *%* |
| Under $5,000 | 16,300 | 6.4% |
| 5-9,999 | 28,315 | 11.0 |
| 10-14,999 | 28,300 | 11.0 |
| 15-19,999 | 29,540 | 11.5 |
| 20-24,999 | 30,545 | 11.9 |
| 25-29,999 | 27,965 | 10.9 |
| 30-39,999 | 44,410 | 17.3 |
| 40,000 and over | 50,995 | 19.9 |
| **Total** | 256,375 | 100% |
| **Average Income** | $27,179 | |
| **Median Income** | $24,193 | |

*Source: Census of Canada, 1981 Statistics Canada*

Dalhousie, and Carleton Wards.

**EMPLOYMENT**

Ottawa's major employer is the federal government, with about 40 percent of all jobs within the city being civil service. Another 45 percent are in the service sector directly or indirectly dependent upon the federal government. Two-thirds of all jobs (150,000 jobs) are office-based. Ten percent of all jobs are in the retail sector.

Employment participation rates have increased significantly at just over 70 percent in 1983, up from 62 percent in 1971, due largely to increased participation by women. In 1971 about 46 percent of all women in the total female labor force worked. Presently, 60 percent or 6 out of every 10 women in the age groups 15 to 65 are in the job market working or seeking employment. This trend is expected to lead to a higher demand for daycare services and increased disposable income.

Total employment in Ottawa grew by 37,500 between 1971 and 1981. While the city's population declined from 302,400 in 1971 to 295,200 in 1981, the employment rate grew at about 2 percent annually. Since 1981, both the population and employment have grown. By 1984, the total number of jobs stood at 224,000.

Total employment is estimated to increase to about 324,400 in the year 2001, or an average annual growth of about 3 percent. Considering population projections, it is possible that the city will find itself with as many jobs as residents. Part-time work is also expected to flourish as more and more young professionals try job-sharing and freelancing.

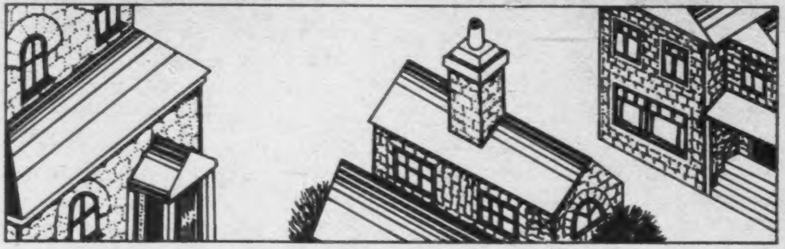
**INCOME**

The City of Ottawa leads surrounding areas in per capita income due primarily to the increase in the number of young professionals who make up one- and two-person households.

Incomes are expected to experience real growth due to Ottawa's smaller population per job ratio bringing more income to Ottawa in the future as a large proportion of employed people continue to live in the city.

On the other end, there are more low-income households and individuals in the city compared to its satellite communities. About 24,000 families in the Ottawa-Hull area (over 12 percent) were considered low-income in 1980. Nearly 11,000 of them lived in the City of Ottawa, making up 14 percent of Ottawa's total families.

COMPARATIVELY SPEAKING



***Thirty-seven percent of Ottawa's households had incomes of $30,000 or more in 1980 compared with Washington, D.C.'s 23 percent.***

Illustration by Diana Souza

COMPARATIVELY SPEAKING

Average household income in Ottawa remains lower than in surrounding municipalities. Incomes in the Ottawa-Hull area have increased numerically at unprecedented rates during the last 15 years, from just over $11,000 in 1970 to just over $27,000 in 1980--a 133 percent increase. However, inflation decimated any real growth in income, with incomes growing at only .5 percent in the 1970 to 1980 period.

The City of Ottawa represents the major consumer market within the broader Capital Area, accounting for about 45 percent of total personal income ($3.3 billion) in 1980. High-income residents in the City of Ottawa outpace those of the Ottawa-Hull area, earning just over $11,000 and just under $10,000 respectively in 1980. One in five Ottawa-Hull households in 1980 had an average income of over $40,000. Median household income was just over $24,000, indicating that exactly half of all households had a total income of this amount or higher.

**EDUCATION**

Ottawa's public school system maintains 55 elementary schools and 24 high schools (of which 18 offer instruction in English, 6 in French).

In addition, the Catholic Church maintains 61 primary schools (32 with French instruction, 29 with English); 6 intermediate schools (5 with French, 1 with English); and 5 junior high schools, all with English instruction. Tuition for residents is free through grade 10, after which Catholic schools are private and charge tuition (all instruction is in English).

The Ottawa school system offers two language programs. The immersion program offers instruction totally in French for the first few years, gradually phasing in English instruction until the program becomes bilingual. The core program, which varies from school to school, offers 20 minutes of instruction in French a day through the eighth grade.

**SOURCES**

An extensive series of publications about the City of Ottawa are available from the City of Ottawa's

*continued on p.7*

# The National Capital Area

The City of Ottawa is the hub of the National Capital Area (population, 780,000)--an area consisting of the Ottawa-Carleton Region, the Outaouais Region, and towns and villages within a radius of about 50 kilometers from the center of Ottawa. This area is roughly equivalent to the Ottawa-Hull Census Metropolitan Area, excluding the township of West Carleton and some rural towns and villages. Within the Capital Area, residents of the various municipalities travel across municipal boundaries daily for work, shopping, and leisure activities.

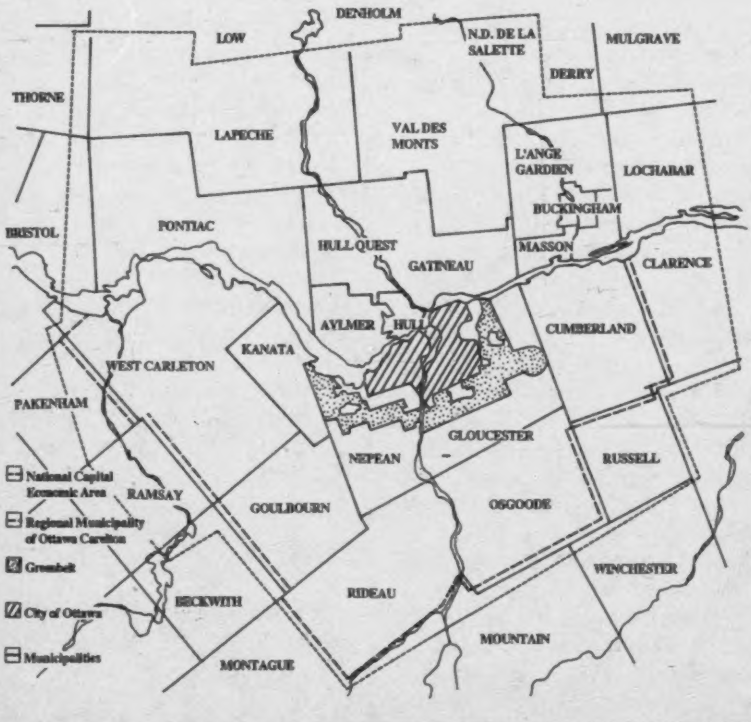
Like many other old municipalities at the center of greater metropolitan areas, the City of Ottawa differs from its surrounding communities in important ways. The National Capital Area has, for example, grown at almost 2 percent annually since 1970--a high rate in view of three recessions in the area since 1970 and very close to a rate that would strain any municipality's ability to provide services and facilities on a timely basis--while the City of Ottawa lost population until 1981 and then only grew negligibly.

Most of the growth in the Capital Area occurred in the regional municipality of Ottawa-Carleton--which includes the City of Ottawa. The Greenbelt--a ring of green open space created in the 1950s by the federal government--separates the City of Ottawa proper from the rest of this region. About 90 percent of the growth in the 1970s and most of the growth in the period between 1980 and 1984 took place in the eastern and western communities--Orleans in the east, Kanata, Bridlewood, and Hazeldean in the west. Ten percent of regional growth took place within the area inside the Greenbelt. Although the largest municipality in terms of population within the National Capital Area, the City of Ottawa did not gain substantially from this growth.

The City of Ottawa's share of the population of the Capital Area has continuously declined since the mid-1950s, from nearly 62 percent in 1961 to just under 40 percent in 1981. This trend is expected to continue as growth in such satellite communities as Orleans and Kanata remains strong. By the year 2001, the city's share is expected to decline to about 37 percent of the total, although Ottawa's population will continue to grow slowly in actual numbers. The regional municipality of Ottawa-Carleton now holds about 75 percent of the Capital Area's total population.

Although different in many ways from its surrounding communities, the more urbanized City of Ottawa sets trends for the entire area--in aging, formation of small households, declining numbers of school-age children, and growing single-parent families. However, the proportions of senior citizens, middle-aged residents, nonfamily households, and single-parent families in the city are all higher than the respective proportions in the Capital Area. The number of school-age children and fertility rates, on the other hand, are generally lower in the Ottawa-Carleton Region as compared with the Capital Area, as the majority of residents in this region are professionals or office workers with specialized skills and higher

**Ottawa at the hub of the National Capital Economic Area**


DENHOLM
LOW
N.D. DE LA SALETTE
MULGRAVE
DERRY
THORNE
LAPECHE
VAL DES MONTS
L'ANGE GARDIEN
LOCHABAR
BUCKINGHAM
BRISTOL
PONTIAC
HULL QUEST
GATINEAU
MASSON
CLARENCE
AYLMER
HULL
CUMBERLAND
KANATA
WEST CARLETON
PAKENHAM
GLOUCESTER
NEPEAN
RUSSELL
RAMSAY
GOULBOURN
OSGOODE
WINCHESTER
BECKWITH
RIDEAU
MOUNTAIN
MONTAGUE
National Capital Economic Area
Regional Municipality of Ottawa Carelton
Greenbelt
City of Ottawa
Municipalities

education who tend to have fewer children.

Despite rapid growth in such communities as Kanata, Aylmer, Gatineau, and Orleans, the population of the Capital Area is aging. Senior citizens made up about 9 percent of the total population in 1984, up from about 6 percent in 1971. Of particular importance are the age groups 55 to 64 and over 65. By the year 2001, population in these age groups will more than double the 1981 figures.

The City of Ottawa is considerably grayer. In 1981, only about 8 percent of the total population of the Capital Area was over 65, whereas in the City of Ottawa the corresponding share was over 12 percent. And Ottawa is expected to age rapidly with about 20 percent of Ottawa's projected 345,000 residents joining the over-65 set by the year 2001, at which point about 65 percent of the Capital Area's estimated 105,210 seniors will reside within city limits.

The number of children between the ages of 0 and 14 has declined steadily in the Capital Area since 1971, with those in the middle age groups, particularly the 25-to-34 age group, increasing significantly due to the professional and service nature of Capital Area employment attracting the younger crowd. The decline in the number of children under age 5 is most rapid in the City of Ottawa where in 1961 about 11 percent of the population fell within this age group as compared with only 5 percent in 1981. The number of children in the 0-4 age group is expected to continue downward, while numbers of children in the 5-14 age group will continue to rise, although as a percentage of the total will decline.

Like the City of Ottawa, the Capital Area saw dramatic growth in household formation in the period 1971-1984. The rate of growth in the number of households outpaced the rate of growth in population, with nearly 8,000 new households springing up annually. As the total number of households grew rapidly at about 4 percent annually, the average household size declined from 3.5 persons in 1971 to 2.6 persons in 1984 with one- and two-person households becoming dominant. In 1971, just over one-third of Capital Area households consisted of one or two persons. By 1984, over half fell in this category, while in the City of Ottawa nearly two-thirds did.

The single-parent family in the Capital Area grew at a greater rate than total population, total households, as well as one- and two-person households (nearly 6 percent annually between 1976 and 1981). The number of single-parent families in the Capital Area jumped from nearly 19,000 in 1976 to about 24,000 in 1984. Nearly half of these families lived in the City of Ottawa in 1981. •

*- -Denise Rusoff*
*Editor*

C O M P A R A T I V E L Y S P E A K I N G .

Illustration by Diana Souza

***Ottawa's average household size is 2.2 persons, as compared with Washington, D.C.'s 2.4 persons; both are expected to decrease further.***

C O M P A R A T I V E L Y S P E A K I N G

*continued from p5*

Department of Community Planning and Development, Planning Branch. All publications are available in French and English. Titles presently available include An Inventory of Existing Lands, Housing Profiles and Densities, Existing Growth Potential in the Residential Sector, Existing Commercial and Industrial Floor Space, Population Projections, and Municipal Directions Statement. These August, 1985 publications also offer statistics on the National Capital Economic Area, the Ottawa-Hull Metropolitan Area, and the Ottawa-Carleton Region. Order from the City of Ottawa, Department of Community Planning Development, Planning Branch, Ontario Province, Ottawa, Canada.

A family expenditure survey conducted in 1982 is available from Statistics Canada for $25, which includes data on Ottawa households. Order from Statistics Canada, Publications Sales and Services, Ottawa K1A OT6, Canada. For credit card orders, call (613) 973-8010.

Statistics Canada also offers fresh estimates each year on Canadian demographics. Call (613) 990-8116 for information on available publications. The upcoming June 3 census should provide a wealth of up-to-date statistics. •

## COMING UP

**Pakistan:** An increasingly urban Islamic state favoring U.S. products

**French women:** How they see themselves

# Adapting advertising copy for international markets

It still happens all too often. A company spends a considerable sum on researching a foreign market. Then it spends more for its advertising agency to create an international campaign concept. Only in the end, however, does it allocate funds to deal with its now pressing translation needs.

This is no way to "speak export," according to Ursula Gruber, president of Paris-based Ursula Gruber Communication Internationale, S.A.--a company specializing in multilingual adaption of advertising and promotional copy for such clients as IBM and American Express. Conveying an advertising message with the same impact as the original across a language barrier presents a whole host of problems for the ordinary translator. To get around these problems, Gruber relies on about 200 specialist copywriters and technical experts living in their home countries and translating only into their native language.

"Language is too important in the collective national markets making up an international campaign to be left to mere translators brought in late in campaign planning," says Gruber. She suggests these guidelines for successful copy adaption.

**When you create your advertising message, do so with international adaption in mind:**

-Avoid plays on words and rhymes and the creation of new words that prove almost impossible to adapt into another tongue.

-Give your products names that can be pronounced by your target group abroad, names that do not have negative connotations in another country.

-Avoid illustrations of a distinctly national kind if they are to serve as identification aids for your target audience.

-While doing your layout, bear in mind that copy lengths change when you go into another language. As compared with English, Latin languages need about 20 to 25 percent more print space. German and Scandinavian 25 to 30 percent more.

-Make certain only complete and approved copy is provided to your adaptors, since last-minute changes or additions to the text have to be multiplied by the number of languages involved, and, of course, add to costs.

**Select your adaption partners just as carefully as you would your creative team:**

-Find out whether they have advertising experience and potential for producing adaptions with a strong impact directed at the right target group.

-Check that your adaptors are working into their mother tongue and that whenever possible they are actually living in their own country. People who live abroad for any length of time begin to lose their own language. Copywriters particularly must be fresh, be familiar with up-to-the-minute expressions, market climate, advertising trends, and so on.

-Ensure that the adapting team is made up of professional people: e.g. copywriters for ad copy or for direct-mail, journalists for PR work, qualified people for technical copy, and make sure that they do not employ students and other underqualified translators.

-Be suspicious of somebody who quotes you a price without seeing the original. Or anyone who fails to ask you about what the job is for, the target sudience, strategy or other background information.

**Plan ahead for the adaption of your advertising message just as carefully as for the initial material:**

-Adaption will cost more than translation but nevertheless will be a small percentage of the overall cost of the operation. During budget planning, allot a sum for adaption from the outset--a sum which is sometimes comparable to initial copy conception costs.

-Deadlines: be realistic. Work "needed yesterday" is not going to be the most effective voice in which you speak export tomorrow.

-Provide as much background material on the subject matter as possible: earlier brochures, competitors' material, articles from the trade press, photographs, etc. Especially useful is existing material in the language concerned which can help with company terminology.

-Allow sufficient time for briefing your adaption partner.

-Give good original copy and make sure it contains no ambiguities.

-Supply visuals or layouts. It is important that the adaption team knows exactly what you are trying to do. Often the visuals set the whole mood of the job in question.

-Introduce your adaption team to anyone in your organization who can be of particular help to them. This can be valuable for checking special company terminology each company tends to build up and use.

This approach also encourages acceptance by branch office management of the adaption team and its work.

-Plan all typography at an early stage. It should be entrusted to professionals who are equipped to handle typesetting in foreign languages.

-Arrange for proofreading by the adaption team who can pick up errors such as capital letters wrongly used, incorrect word breaks, missing hyphens and accents, plurals and singulars and so on.

-Avoid using the telephone and telex for transmitting copy or copy changes. Urgent material may have to be handled in this way but with

*continued*

languages it is always better to work with typescript. On the other hand, a telecopier--particularly if visuals are involved--is an ideal solution for urgent cases, provided the text is not too long.

-Remember adaption is an essential link in your communications.

Good results depend a great deal on how you set about planning for it.

*These adaption do's and don'ts are copyrighted by Ursula Gruber Communicaion Internationale, S.A., 83, rue Saint-Honore, 75001 Paris, France; telephone, (1) 233-57-61; telex, 670690F.*

FEATURE

# Pensioners have 15 percent of disposable income in U.K.

Disposable income in 1984-85 in the United Kingdom is estimated to have been about $3,742 for pensioners and about $5,480 for non-pensioners.

In the U.K., pensioners are 23 percent of the adult population and 18 percent of the total population. Their personal disposable income totals 15 percent of the disposable income held by consumers in that nation.

These data are included in the 1986 edition of *Social Trends*, an annual publication of the British Government Statistical Office.

The usual pension age in the United Kingdom is 60 for women and 65 for men. All but a small proportion qualify for a national insurance pension which, on average, accounts for about 49 percent of a pensioner's income. Occupational pensions account for 22 percent of income, and earnings and investment income each account for 9 percent. The other 11 percent comes from other social security benefits including housing and disability benefits.

According to G.C. Fiegehen, of the economic advisers' office in the Department of Health and Social Security, who prepared an article on "Income After Retirement" for this issue of *Social Trends:*

"On average, couples over pension age had about $118 disposable income per week in 1982, other men about $74, and other women about $67, but in each of these categories the youngest--those just over pension age--tended to be better off than those aged 75 or over."

Younger pensioners, Fiegehen said, are better off partly because they often work part-time and because they are more likely to have occupational pensions.

Besides the special chapter on pensioners' disposable income, this year's *Social Trends* includes articles on trends in household and family formation, education, employment, health and personal social services, housing, transport, communications, leisure, participation in such activities as religion, trade unions, and charitable organizations, and law enforcement.

In Britain, order *Social Trends 16* (1986) from Her Majesty's Stationery Office, PO Box 276, London SW8 5DT, England; telephone 01-622 3316. Cost in pounds is 19.95

In the United States, order from Bernan Associates, 9730-E George Palmer Highway, Lanham, MD, 20706. $32.91.

## PUBLICATIONS

**China: Long-Term Development Issues and Options,** 1985, Washington, D.C.: The World Bank, 400 pps., $29.95 hardcover, $14.95 softcover. Order from The World Bank, Publications Department, K956, 1818 H St., N.W., Washington, DC 20433. (See also the six supplemental volumes listed at the end of this report.)

The people of China face enormous change in the next decade or two. This report attempts to outline some of the issues and options that must be considered in that country. Topics include agriculture, population, education, employment, technology, transportation, industrial location, internal and external trade, and finance. The difficulties of making predictions related to developing strategies and applying lessons of international experience to China--a country that differs in important respects from all others--are discussed.

Six background papers prepared for this country's economic study are also available. They are listed here with their prices, length, and stock numbers and are available from the address above. Titles are self-explanatory.

**China: Issues and Prospects in Education** (Stock No. BK 0600), 92 pps., $5.00.

**China: Agriculture to the Year 2000: Prospects and Options** (Stock No. BK 0601), 170 pps., $8.00.

**China: The Energy Sector** (Stock No. BK 0602), 240 pps., $10.

**China: The Economic Model and Projections** (Stock No. BK 0603), 114 pps., $5.00.

**China: Economic Structure in International Perspective** (Stock No. 0604), 120 pps., $5.00.

**China: The Transport Sector** (Stock No. BK 0605), 140 pps., $8.00.

# REGIONS

## *EUROPE*

### The Netherlands

Census taking may be a thing of the past in the Netherlands. Although the new census law adopted in 1970 called for census taking at regular 10-year intervals, grassroots census resistance yielded such a high nonresponse rate on two noncompulsory pilot tests in 1979 that the scheduled 1980-81 census was postponed.

Many consider this postponement the death knell for the 1990-91 census also. The Central Statistical Commission already advised the minister not to submit the necessary proposal to parliament. Whether the census law will be officially repealed is not clear.

Since a population and housing census is an unrivaled source of multivariate data, the consequences of not taking a regular census are clear. The Netherlands, however, has a universal population register recording births, deaths, and changes of residence and conducts surveys on such topics as labor force participation and housing.

### West Germany

After Germany imposed a strict immigration ban in 1975, it was assumed that many Turkish workers would return home and West Germany's unemployment problem would go away. Neither happened.

Unemployment among the immigrants was cushioned by unemployment benefits and services--the sum total of which came near to or exceeded the option for earned income in Turkey. In addition, employment opportunities for Turkish workers generally did not overlap with those for German workers.

As a result, West Germany's Turkish population remains stable, helped by family reunification and a high birthrate. Turkish workers now number about 1.2 million--2 percent of West Germany's total population. Counting their dependents makes West Berlin the city with the third highest Turkish population in the world.

### Italy

No doubt about it. Italian men are changing. They are generally more involved on an equal basis in the household and in children's upbringing although social stratification, geographic conditions, and levels of industrialization affect the degree to which macho attitudes and ingrained traditions give way to change. And, surprisingly, a survey released in 1985 reports that Italian men are less resistant to learning about and practising modern forms of contraception than was thought by the Italian FPA--the organization that conducted the survey.

Traditionally, Italians have been slow to accept modern forms of birth control. In fact, they are among the lowest users of modern contraception. In some areas, the old abortion culture is preferred to the new contraceptive culture. In 1984, only a little over 6 percent used the pill, four percent used IUDs, 6 percent condoms, and 2 percent the diaphragm. Even in Italy's industralized northern and central regions--where profound changes have occurred in family organization, the number and spacing of children, and the use of contraceptive methods--the falling birthrate is largely due to withdrawal backed up by abortion rather than modern contraceptive use.

Italian men surveyed in Turin, Genoa, Milan, and Rome overwhelmingly indicated (77 percent) that convenient locations for clinics and clinic hours outside working hours outweighed other considerations in their inclinations to find out about and use modern contraceptive methods. Only 12 percent of those surveyed showed a preference to the sex of clinic staff. Nearly three-quarters admitted they had experienced problems with sex--36 percent with contraception, 23 percent with their partners, and 14 percent with venereal disease. Eighty percent discussed their problems with others.

The results of this survey run contrary to the assumptions that Italian men would not attend clinics due to discriminatory attitudes toward women or reluctance to seek information on contraception or sexuality due to shyness or macho attitudes. Italian men may have changed more than we think.

### Romania

Birthrates of most countries of Eastern Europe continue to converge with the very low rates of their northern and western neighbors. Romanian fertility, for example, has dropped below the replacement level of about 2.1 births per 1,000 for the first time since abortion was outlawed in 1966. Romania's total fertility rate was 2 lifetime births per woman in 1983. East Germany's birthrate was a low 1.79 per 1,000; Bulgaria's, 2.0; and Yugoslavia's, 2.06.

## *AFRICA*

### Morocco

Morocco's 1982 census count--20.5 million inhabitants--appeared surprisingly low to some observers. However, Morocco's birthrate is down from its high of 53 births per 1,000 population in the late 1950s to 37 per 1,000 in 1985.

In addition, the 1984 Contraceptive Prevalence Survey taken by the Public Health Ministry indicates that knowledge of contraception jumped 53 percent since 1980 alone. Ninety percent of ever-married interviewees said they had heard of at least one modern contraceptive method, with the pill receiving the most recognition. Forty percent were using a modern method, and 5 percent were using a traditional method.

Two-thirds of urban women interviewed said they did not wish to have any more children; slightly less than half of rural women agreed with their city counterparts.

## *MIDDLE EAST*

### Pakistan

Afghan refugees, the largest refugee population in the world today, are primarily sheltered in Pakistan. Over 2.5 of the 3.5 million Afghan refugees live in Pakistan; the remaining 1 million, in Iran.

Refugees in Pakistan are allowed to work and move about without restriction, largely due to their close cultural and strong political ties with the Pakistani people.

Although many Afghans have assimilated into Pakistani life, their sheer numbers have put strains on Pakistan's economy and have created some social tensions in their adopted country.

### Lebanon

A new survey conducted by the Lebanon Family Planning Association in the rural areas of West Bekka and North Lebanon is a welcomed addition to the scant body of recent demographic data from war-torn Lebanon. The new report covers interviews with 1,455 women. Findings indicate that although fertility is high in rural Lebanon, women's contraceptive knowledge and ability to limit births are widespread.

Respondents in the South said they expected to have an average of about 6 children, while those in West Bekka said about 5 children. Women aged 40-44 in the South reported they had had about 8 live births. Those in West Bekka said they had had 7.

Knowledge of family planning was widespread. About 84 percent of women in the South had used a modern method at some time; 63 percent in West Bekka. The pill was the most popular modern method.

At the time of the survey, 47 percent of Southern women and 31 percent of those in West Bekka were actually using some method of birth control. Women from West Bekka were more likely to be using traditional rhythm methods than those from the South. Education, working status, or husband's occupation did not affect the likelihood of a woman using family planning.

Lebanese women do have the ability to limit the number of children due to the availability of family planning and high husband approval (about 85 to 90 percent). Most rural Lebanese women desire 5 births, 4 at a minimum. Only about 16 percent of those with 1 or 2 children said they wanted no more children. Two-thirds of women with 3 to 5 children reported they wished to cease childbearing.

This report was conducted as part of the USAID-supported Contraceptive Prevalence Studies II program with the technical help of Westinghouse Health Systems.

## *ASIA*

### The Philippines

The population of the Philippines has increased threefold since 1948 to an estimated 56.8 million in 1985. This ranks the Philippines 15th in population worldwide.

Although the average number of children per woman fell from just over 6 children in 1960 to slightly fewer than 5 children in 1980, rising life expectancy has kept the population growth rate at the high level of 2.5 percent. And, despite decreasing fertility, the country's population is still young with about 43 percent below age 15.

The national government under Marcos had a population growth rate reduction plan. However, even if government aims could be met, the population of the Philippines would still double by the early 21st century. Whether the new government will pursue previous plans or devise new ones remains to be seen.

## ASIA PACIFIC

### Australia

Australia will see annual average population growth rates of between 1 and 1.2 percent over the next 35 years, according to the research project, "Projections of the population of Australia, states and territories: 1984 to 2021." Projected population is expected to hover around 18 million in 1996; 21 million in 2011; and 23 million in 2021. •

**FEATURE**

# Nigerian airwaves call for family planning

With the release of Nigeria's long-awaited updated population policy expected soon, there are signs that the family planning message is making powerful headway in the markets and streets of Africa's biggest nation--whose population is now thought to be close to 100 million.

Five years ago, the majority of Nigeria's traditional leaders were wary of the issue, and the media largely ignored the subject. But in the past two years Nigerian newspapers have highlighted the country's unchecked population growth, and today most of Nigeria's 19 states have family planning programs.

Nigeria's development planners were given some unpalatable food for thought last year with the publication of a report by the Futures Group of Washington assessing the effects of population growth on the country's social and economic development. This report, part of the RAPID series (Resources for the Awareness of Population Impact on Development), projected the impact of restrained and unrestrained population growth on such areas as food production, fuelwood resources, petroleum, education, health, urban growth, and housing.

Although the report drew criticism for being overly pessimistic, it had a positive effect on the spread of family planning activities. The starting point for population projections in Nigeria has long been problematic as it depends on a census that is more than 20 years old.

United Nations' estimates project that at the present growth rate of 3.2 percent a year, Nigeria's population will double in 22 years to 186 million. RAPID started with a 1985 population of 98.5 million and, using figures from the Nigerian Fertility Survey of 1981-82, calculated an annual growth rate of 3 percent. This assumes a fertility rate of 6 children for each woman.

Nigeria's Armed Forces Ruling is expected to spell out a clear definition of population goals and targets in the National Population Control Policy under preparation, and to designate who will be responsible for implementation.

A recently developed program of family planning initiatives is already in place in several states with technical assistance and funding from the Population Communication Services of Johns Hopkins University. Pictorial booklets on pills, IUDs, and condoms are now available in Nigeria's four major languages--Yoruba, Ibo, Hausa, and Pidgin English. They are the first of their kind available in the country and were designed with barely literate persons in mind in collaboration with the Planned Parenthood Federation of Nigeria (PPFN), an affiliate of the International Planned Parenthood Federation (IPPF).

Demand for these booklets among Ministry of Health clinic personnel has already outstripped limited supplies. A similar booklet on female voluntary surgical contraception is also being developed with the University College Hospital in Ibadan.

While the Nigerian media have highlighted unchecked population growth over the past two years, newspapers have been more generous in their coverage than radio and television. To combat this imbalance, PPFN in conjunction with the federal government and radio and television authorities is sponsoring a national radio and TV workshop later this year to help promote cooperation among health and broadcast professionals.

In Abeokuta, Ogun State, nurses from family planning clinics take to the streets to carry their message to the community. They distribute booklets and sing and dance.

Kwara State's family health project started slowly but was dramatically transformed when the Ministry of Health officially launched the first family planning program last year with media backup. Within three months, users of birth control increased by 123 percent. Simultaneous radio and television broadcasts promoted the idea that spacing was a traditional Nigerian concept, not a new or foreign idea. Modern methods were now available however, they emphasized.

In Plateau State, a multimedia campaign is underway in partnership with PPFN. Most materials use Hausa and are specifically male-oriented.

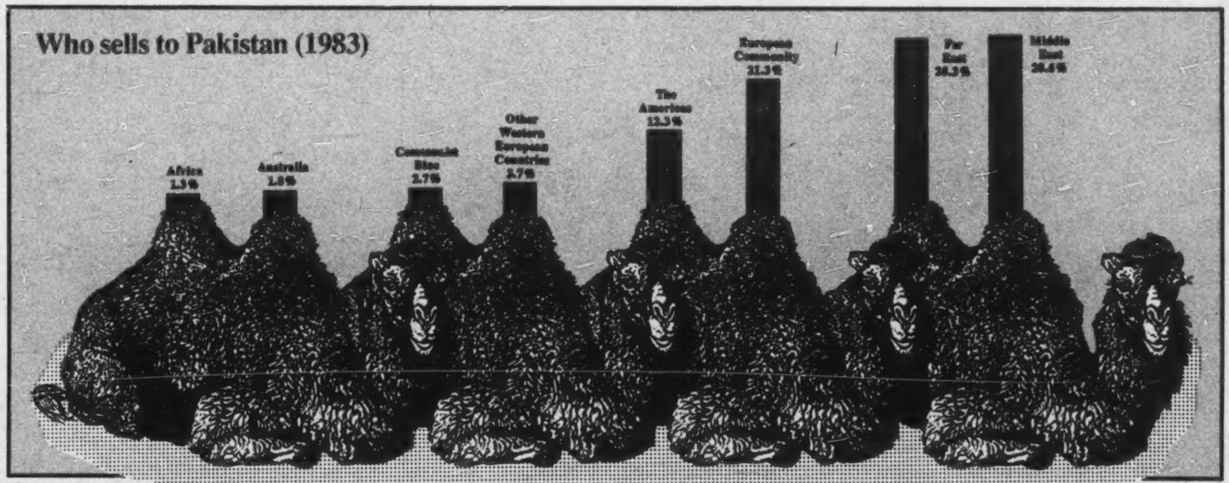
Women's clubs and organizations are being drawn into promoting health and family planning in Imo State. Traditional leaders "bless" women's organizations and provide testimonials on the need to space births and accept immunizations and other health measures.The role of traditional leaders is particularly important since in at least one area of Imo women with 10 or more children are anointed and asked into an exclusive club. •

--*Jose Rimon*
People *News/Feature*

International Demographics
P.O. BOX 68, ITHACA, N.Y. 14851

CONSUMER TRENDS AND MARKETS ABROAD
JULY 1986 VOLUME 5, NUMBER 7

# International Demographics



Who sells to Pakistan (1983)

*Source: Euromonitor Publications Ltd., 1985*

## COUNTRY PROFILE

# The Islamic Republic of Pakistan

"Pakistan...composed of letters taken from the names of our homeland...Punjab, Afghana, Kashmir, Iran, Sindh, Tukharistan, Afghanistan, and Baluchistan. It means the land of the Paks, the spiritually pure and clean." So stated a group of Muslim students in Cambridge, England 14 years before the British parliament carved Pakistan out of India in 1947. The India Independence Act created two separate and independent dominions. India was to be predominately Hindu; Pakistan was to provide a "homeland for South Asian Muslims."

The original partitioning allowed for both an East and West Pakistan separated geographically by India. However, in language, culture, ethnic background, and economic resources, these two areas were totally disparate. Their only bond was their state religion--Islam. Years of violence ensued. Finally, in 1971, a large Indian army entered on the side of Bengali separatists, and Bangladesh was born. With the secession of East Pakistan, the modern boundaries of Pakistan were finalized.

Pakistan is now in a period of transition. For most of 1985, President Mohammed Zia-ul-Haq (who seized power in 1977) ruled Pakistan under martial law. On December 30, 1985 martial law was lifted and a modified version of the 1973 constitution was adopted, restoring fundamental rights of Pakistanis and powers of the judiciary. Zia remains head of the Pakistani state (and Chief of Army Staff) but shares authority with Prime Minister Mohammed Khan Junejo, leader of the majority party in the National Assembly.

Pakistan's 796,095 square kilometers make it just larger than the state of Texas. Not included in the area are the disputed Pakistan-held areas of Jammu and Kashmir, an additional 95,181 square kilometers. These areas and Baltistan and Gilgit in the North are not included in the Pakistani census.

*continued*

## INSIDE

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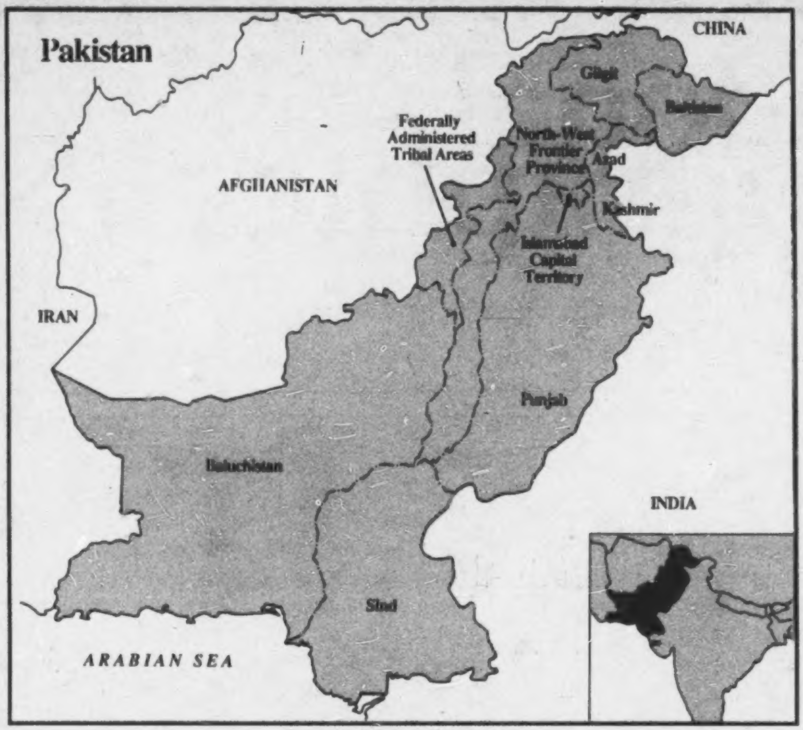
THIS MONTH: PAKISTAN



Topographically, Pakistan divides into three areas: the mountainous terrain of the northern highlands, the fertile and densely populated Indus Plain along the eastern border, and the arid Baluchistan Plateau in the southwest.

### REGIONS AND CITIES

Pakistan is divided into four provinces--Punjab, Sind, North West Frontier Province (NWFP) and Baluchistan. Outside the provincial boundaries and along the western border is the Federally Administered Tribal Area (FATA). The Federal Capital Territory Islamabad, a separate and distinct government territory, is often grouped with Punjab Province for census purposes.

The last census recorded the 1981 population at 84.3 million--nearly double the 1961 figure of 42.9 million. The Pakistani government estimated the 1984 population at 93.3 million, excluding the disputed Pakistani-controlled areas and Afghan refugees. The U.S. government placed the total population higher, at about 99.2 million. By mid-1986, Pakistan's population is estimated to swell to nearly 102 million.

Pakistan's average annual growth rate of just over 3 percent since 1981 makes it one of the world's fastest growing countries. Pakistan's fastest growing province is also its largest. Baluchistan's population increased from 2.4 million in 1972 to 4.3 million in 1981. FATA is the only area showing a loss of population--from 2.49 million in 1972 to 2.2 million in 1981, a decrease of 12 percent.

Pakistan averages 100 people per square kilometer although the figure varies greatly between provinces and areas. Federal Territory Islamabad is the most densely populated with 376 people per square kilometer, followed by Punjab with a density of 230 people per square kilometer. Baluchistan, with only 12 people per square kilometer, is Pakistan's least populated area.

As are most developing countries, Pakistan is urbanizing rapidly. Between 1951 and 1981 the urban population quadrupled. By 1981, 28 percent of Pakistanis lived in cities. Projections place 40 percent of the population in cities by the year 2000.

Karachi--the capital of Sind Province--outpaced all other Pakistani cities with its population increasing by 250 percent between 1941 and 1951 and doubling again the following decade. Karachi's 1981 population of 5.1 million makes it Pakistan's largest city. The industrial and commercial nerve center of the country, Karachi accounts for about half of Pakistan's manufacturing output.

Pakistan's newest city, the federal capital of Islamabad, grew rapidly to a population of nearly a quarter million in the years since construction began in 1961.

### SUNNI DOMINANT ISLAMIC SECT

Although created as a sanctuary for followers of Islam, Pakistan suffers from periodic disputes between the members of Islam's various sects. Sporadic outbursts of violence harm national unity.

Sunni Muslims are in the majority and control the government. Their practices, codified as law under President Zia, are opposed by the Shiites who make up between 20 to 25 percent of the population. Particularly grating to Shiites are the 1979 Hadood Ordinances instituting the traditional Islamic penalties of flogging, stoning, and amputation. Offenders are tried by Shariat benches, a judicial arm of the government in which church and state are one. However, although Sunni customs prevail, many minority Muslim sects enjoy the

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protection of the law and are represented at the provincial and national level of government.

Some sects have not fared so well. A constitutional amendment in 1974 barred the Ahmadi sect from membership in the Islamic community. As non-Muslims, Ahmadis as late as 1984 were prohibited from using Islamic terminology or from converting others to their faith.

Ninety-eight percent of the Pakistani population is Muslim. The remaining two percent--mainly Hindus, Christians, and Parsis--can worship freely but are prohibited from preaching to Muslims and are denied some legal rights.

## ETHNICITY AND LANGUAGE

Punjabis remark that every 25 kilometers in Pakistan means speaking a different language. Twenty spoken languages and numerous dialects make them right. Pakistan's official language, Urdu, is native to only about 8 percent of Pakistanis. English, the language of commerce, is in general use in government offices, military installations, business organizations, and institutions of higher learning.

Generally, ethnic groups and the use of their native languages divide along provincial boundaries. Punjabi, the native tongue of Pakistan's predominant group, is spoken in 48 percent of all Pakistani households and in about 80 percent of Punjab and Islamabad Federal Territory households. Sindhi is spoken by 52 percent of households in Sind Province, Pushto in 68 percent of NWFP households. Pushto, native language of the FATA, is spoken by FATA's entire population.

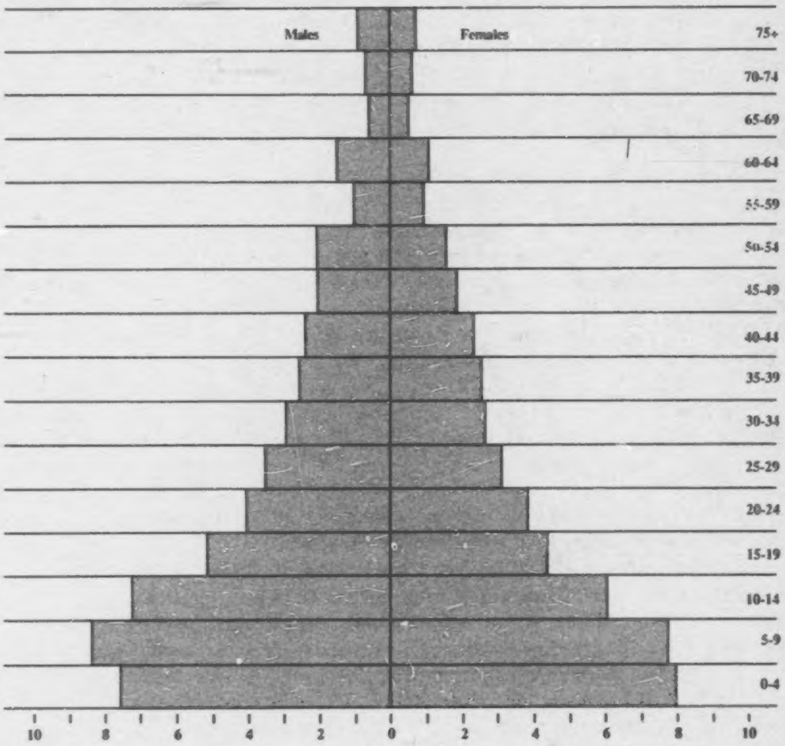
Afghans are Pakistan's fastest growing ethnic group due to immigration caused by the Soviet occupation of Afghanistan. In 1983, 2.2 million Afghans resided in 300 camps located primarily in the NWFP and Baluchistan. Afghan refugees brought with them an estimated 2.5 million head of livestock (camels, goats, and sheep). As these herds compete with local stock for water and grazing areas, refugees are not always welcomed with open arms.

Despite support from the international community, the Pakistan government spends an estimated $1 million a day to support Afghan refugees. Pakistanis fear that Afghans will not repatriate even if the Soviets withdraw.

## RUNAWAY POPULATION GROWTH

At independence in 1947, Pakistan was home to 32 million people. By 1984, the population had tripled to nearly 93 million, making Pakistan the world's ninth most populous country, although in area it ranked 34th. Its 3 percent annual growth rate placed it among the world's fastest

**Pakistan population distribution by age group and sex, 1981** *(in percent)*



| *age group* | *total* | *male* | *female* |
|---|---|---|---|
| All Ages | 84,253 | 44,232 | 40,021 |
| 0-4 | 12,948 | 6,334 | 6,614 |
| 5-9 | 13,485 | 7,003 | 6,482 |
| 10-14 | 11,083 | 6,054 | 5,029 |
| 15-19 | 7,948 | 4,328 | 3,620 |
| 20-24 | 6,560 | 3,358 | 3,202 |
| 25-29 | 5,605 | 2,970 | 2,635 |
| 30-34 | 4,731 | 2,449 | 2,282 |
| 35-39 | 4,301 | 2,173 | 2,128 |
| 40-44 | 3,958 | 1,986 | 1,972 |
| 45-49 | 3,147 | 1,650 | 1,497 |
| 50-54 | 3,028 | 1,674 | 1,354 |
| 55-59 | 1,641 | 879 | 762 |
| 60-64 | 2,256 | 1,327 | 929 |
| 65-69 | 1,003 | 567 | 436 |
| 70-74 | 1,175 | 688 | 487 |
| 75+ | 1,384 | 792 | 592 |

*Source: Federal Bureau of Statistics, Statistics Division, Government of Pakistan.*

## TIPS ON TRENDS

### Can you trust population projections?

Yes. Projections are not only necessary but often fairly accurate. But they're only as good as the data they are based on. To make sure, check the source and timeliness of the data. As up-to-the-moment data are not available for all countries at all times, assessing trends can be particularly difficult.

Take the difference between 1980 United Nations projections for population growth in urban agglomerations worldwide and the 1982 projections, for example. Declining rates of natural increase in some of the world's largest cities led to some big reductions in population projections for the year 2000. These revised projections are based on the most recent and reliable data from the 1980 round of national censuses and on new survey data.

The most dramatic reductions in UN projections included estimates for Beijing and Shanghai, Mexico City, and Tokyo/Yokohama. Earlier projections for Beijing and Shanghai were based mostly on the 1953 census while the revised ones took into account actual trends in these cities up to 1982 and the 1964 and 1982 censuses. It makes sense, then, that Beijing's projected size in the year 2000 was reduced from 22.8 million to 10.8 million and Shanghai's projected size shrank from the 1980 estimate of 25.9 million to 13.5 million.

Mexico City was a different story. The recently released estimate decreases Mexico City's projected population in 2000 from the 1980 estimate of 27.6 million to 26.3 million based on projected long-term effects of Mexico's decline in fertility.

Part of the decline in projected growth for Tokyo/Yokohama results from a greater than expected reduction in fertility in Japan. Data from the 1975 and 1980 censuses shows that Tokyo/Yokohama grew more slowly than it did earlier in the century. The population of Tokyo/Yokohama is now projected to be 17.1 million in the year 2000, down from the 1980 estimate of 23.8 million.

Not all projections went down, however. Calcutta in the year 2000 now is projected to have 16.6 million, instead of the 1980 estimate of 15.9 million. The projection for Brazil's Sao Paulo also climbed, from the 1980 estimate of 21.5 million to 24 million.

Although the UN predicts lower population projections for many of the world's largest cities, the trend towards larger cities continues. In 1950, about 30 percent of the world's population lived in urban areas. By 1980, almost 40 percent did. UN projections now place half of humanity living in cities by the year 2025.

A recently released UN publication, *Estimates and Projections of Urban, Rural and City Population: the 1982 Assessment*, offers revised projections for urban agglomerations worldwide. According to this publication, Mexico City will be the world's largest city in the year 2000, with 26.3 million people. Sao Paulo with 24 million places second; Tokyo/Yokohama with 17.1 comes in third. Other giants include Calcutta with 16.6 million people; New York/N.E. New Jersey, 15.5 million; Seoul,13.5 million; Shanghai, 13.5 million; Rio de Janeiro, 13.3 million; Delhi,13.3 million; and Greater Buenos Aires, 13.2 million.

growing countries. To continue growing at this rate means a population estimated to reach 150 million by the year 2000.

The reduced birthrate from about 46 per 1,000 population in 1965 to 42.6 per 1,000 in 1985 produced some gains. These gains, however, have been partially offset by the change in the age structure.

From 1960 to 1970, Pakistan's fertility rate--the average number of children a woman will have borne by the end of her reproductive period--averaged 7.5 children. The period from 1970 to 1980 saw a decline to 6.6 children per woman. Although the government credits this decline to increased knowledge of family planning methods, the gap between knowledge and practice is still wide. Preliminary results of a 1985 contraceptive prevalence survey indicate that only 10 percent of respondents were practicing contraception (up from a mere 6 percent in 1975) although a majority of married women knew about family planning methods.

Pakistan's population is young. In 1980, 45 percent of the population was aged 0-to-14, 50 percent was aged 15-to-59, and only about 5 percent was aged 60 or over.

Only the 0-to-4 age group is atypical of developing countries, being slightly smaller than expected. One cause is Pakistan's rising infant mortality rate. From 1976 to 1979, the infant mortality rate averaged 94.2 deaths per 1,000 live births. It now averages 100 deaths per 1,000. Nearly half of all deaths of children under the age of five are due to childhood diseases such as measles, diphtheria, and whooping cough; diarrheal disease; respiratory infections; and neonatal tetanus--all of which can be prevented.

Government health facilities are available to all urban residents, although only 60 percent of rural dwellers have access to any type of health care. Facilities are unevenly distributed throughout the country, and severe shortages of medical personnel exist. Government programs for improving health care are often ineffective due to the low literacy rate, isolation of ethnic groups living in rural areas, limited education and work opportunities for women, and administrative problems.

Malaria and tuberculosis are major health problems affecting all ages. Although Pakistan's food supply is considered good when compared to neighboring countries, malnutrition is widespread and particularly affects young children, infants, and pregnant and nursing mothers.

Life expectancy in Pakistan is 55 years for men and 54 years for women, compared with the upper 70s for most developed countries. The government's Sixth 5-Year Plan aims to lengthen life spans to about 60 years for both men and women through improved medical.

#### HOUSING

Pakistan's Sixth 5-Year Plan recognizes the need for an additional 1.4 million dwellings to adequately house the current population. In 1980, Pakistan's 12.6 million dwellings averaged nearly 7 people per unit. Baluchistan homes are the most crowded, with an average occupancy of 7.6 persons per unit. Urban Islamabad with 5.6 people per housing unit had the least people per unit.

Most Pakistanis own their own homes (78 percent), with less than 7 percent renting their dwellings. Nearly 15 percent of the population lives in rent-free housing. Although the census does not define the term "rent-free housing," several assumptions can be made as to its meaning. A number of industries, especially agriculture, provide housing for workers. Squatters' homes can also be considered "rent-free."

Rapid growth in Pakistan's urban areas--50 percent faster than in Pakistan taken as a whole--results in the proliferation of *katchi abadis*, or squatter settlements. These settlements now house an estimated 25 percent of Pakistan's urban dwellers. Generally, the larger the city, the larger the settlement. Karachi's settlement now houses an estimated 33 percent of the city's population.

The Pakistan government is attempting to supply water and sewer systems to the *katchi abadis* and plans call for electricity and street development projects.

Safe water and adequate sanitary and drainage systems are ongoing problems in all areas of the country. Potable water is available to 77 percent of urban dwellers and 22 percent of rural residents. The existing water supply is subject to unscheduled turnoffs and is available only during limited hours. Lahore is the only city with a 24-hour water supply.

Sanitary facilities and sewage systems are less common than piped water. Only 16 percent of the population has adequate sanitary facilities (48 percent of urban dwellers, 4 percent of rural residents).

## HOUSEHOLDS AND FAMILIES

The ideal Pakistani household is an extended family consisting of a married couple, their sons, and their sons' wives and children. Sons normally leave the father's house only in search of work, although

## INSIDE INFORMATION

### Doing business in Pakistan? Some negotiating tips

Are you male, right-handed, with the patience of a saint and the resources of a Rockefeller? Can you drive a hard bargain without becoming aggressive? If so, you're a natural for doing business in Pakistan.

Pakistanis are adroit businessmen and talented negotiators. When on home turf, they expect foreign businessmen to play by their rules. Rule number one is making first contact through a reputable agent. Your Pakistani agent is a crucial interface. Conducting business without one is nearly impossible. Consider your agent's work over when he arranges the requested appointment. Many agents, however, offer other services for the right price. The agent's fee is always negotiable. To avoid an unintentional insult, let the agent make the first offer.

COMPARATIVELY SPEAKING

Illustration by Diana Souza

***Pakistan's 1985 birthrate of about 40 per 1,000 population compares to 16 for developed countries and 28 for countries in its region.***

COMPARATIVELY SPEAKING

Once an appointment is made, be sure to ask, "Your time or mine?" Pakistani time means being prepared to wait beyond the scheduled hour. To achieve the best results, schedule meetings for morning hours. Some businesses honor the Western weekend of Saturday and Sunday. Monday through Wednesday meetings, however, avoid delays, as the Muslim weekend normally falls on Thursday and Friday.

Although English is the language of commerce and business, a few Urdu phrases go a long way toward cementing relationships. At meetings, Pakistanis may lapse into Urdu to discuss certain points among themselves. No insult is intended.

According to custom, each meeting begins with social conversation. The business at hand should be brought up only when the Pakistani is ready. Any attempt to hurry the process could cause the session to end abruptly. During long meetings, make sure that you do not relax into the pose characteristic of many American men of crossing one leg over the other, with one ankle placed over an opposite knee. Flashing the sole of the foot in any manner is considered an insult in Pakistan.

Once negotiations are concluded, your Pakistani contact may absent himself from any future business dealings. Most Pakistani businessmen in the position to negotiate with foreigners have seconds-in-command who oversee the implementation of the contract and any subsequent dealings. A second-in-command is likely to be British.

Lastly, do no assume that your effort is hopeless simply because the negotiations appear unproductive. Establishing a business relationship in Pakistan takes patience, trips abroad, dozens of meetings, and a marketing budget healthy enough to support all this.

*--Linda Newcomb*

domestic incompatibility sometimes leads to separation. At the death of the patriarch, each son establishes a separate household.

Marriage solidifies all social relationships. Single adults have little place in society. Women achieve status and security by bearing sons. Nothing else affords them these benefits. Tradition, not love, motivates marriage so the families of the prospective bride and groom usually arrange all aspects of the marriage.

Although women often marry by the age of 17, men may wait until they are older and more established. More than 96 percent of the population had been married at least once by the age of 30 in 1981. In 1985, nearly 40 percent of women under 20 were married.

COMPARATIVELY SPEAKING

Illustration by Diane Souza

**Only about 7 percent of Pakistani women work compared to nearly 20 percent of Indian women.**

COMPARATIVELY SPEAKING

Women, although protected by law, are often deprived of their legal rights where marriage is concerned. The Muslim Family Laws Ordinance of 1961 contains strict guidelines governing divorce and polygamy, but women are often unaware of their rights and husbands readily ignore both Islamic injunctions and civil legislation.

## LITERACY AND EDUCATION

Although still low, Pakistan's literacy rate is slowly improving. By 1981, just over 26 percent of Pakistanis were literate, up from nearly 22 percent just ten years before. Islamabad Federal Territory's literacy rate of nearly 52 percent places it first among Pakistan's regions. FATA pulls up the rear with a 6.4 percent literacy rate. Generally, urban areas fare better than rural ones. Lower literacy rates for women than men in all provinces and at all age levels come as no surprise. In 1985, only 7 percent of young women were enrolled in secondary school, compared to 27 percent of young men.

Pakistani schooling is divided into five levels: primary school, grades 1-5; middle school, grades 6-8; high school, grades 9 and 10; intermediate school, grades 11 and 12; and higher-degree programs, grades 13 and up. Only 23 percent of the population aged 10 or older has completed primary school. Fewer than one percent hold a university degree.

Although the Pakistani government aims to build more schools and increase the quality of education, such problems as the perceived necessity for child labor, rapid population increase, and a tradition that does not stress education stand in the way. Former government programs concentrated on upper-level education; accordingly, the number of universities doubled between 1975 and 1982 to the current total of 20. The recent focus on primary education increased the number of primary and middle schools by nearly 40 percent. However, the substantial increase in school enrollment in recent years has been offset by a correspondingly higher drop-out rate.

Universities often bear the brunt of Pakistan's uncohesive society. Periodically, armed factions of Islamic fundamentalists, secularists/leftists, and ethnic nationalists clash, closing campuses for sustained periods.

## LABOR FORCE

Little hard data is available regarding Pakistan's labor force. Government data often are estimates. In 1985, the economically active population was estimated at 28.6 million compared

**Cities with populations over 100,000:**

| | | | |
|---|---|---|---|
| Karachi | 5,103,000 | Bahawalpur | 178,000 |
| Lahore | 2,922,000 | Kasur | 155,000 |
| Faisalabad | 1,092,000 | Gujrat | 154,000 |
| Rawalpindi | 806,000 | Okara | 154,000 |
| Hyderabad | 795,000 | Sahiwal | 152,000 |
| Multan | 730,000 | Mardan | 148,000 |
| Gujranwala | 654,000 | Sheikhupura | 141,000 |
| Peshawar | 555,000 | Mirpur Khas | 124,000 |
| Sialkot | 296,000 | Larkana | 123,000 |
| Sargodha | 294,000 | Wah Cantt | 122,000 |
| Quetta | 285,000 | Rahim Yar Khan | 119,000 |
| Islamabad | 204,000 | Chiniot | 106,000 |
| Jhang | 195,000 | D.G. Khan | 103,000 |
| Sukkur | 193,000 | Nawabshah | 102,000 |

*Source: Federal Bureau of Statistics, Statistics Division, Government of Pakistan (1981 Census)*

### Population distribution by province

*(in thousands)*

| *PROVINCE* | *1961* | *1972* | *1981* | *% CHANGE 1972-1981* |
|---|---|---|---|---|
| PUNJAB | 25,582 | 37,845* | 47,632* | +25.86 |
| SIND | 8,367 | 14,156 | 19,029 | +34.42 |
| NWFP | 5,731 | 8,389 | 11,061 | +31.85 |
| FATA** | 1,847 | 2,491 | 2,199 | −11.72 |
| BALUCHISTAN | 1,353 | 2,428 | 4,332 | +78.42 |
| PAKISTAN | 42,880 | 65,309 | 84,253 | +29.01 |

** Includes Federal Capital Territory Islamabad*
***Federally Administered Tribal Areas*
*Source: Federal Bureau of Statistics, Statistics Division, Government of Pakistan*

### Percentage distribution of households by language usually spoken and region/province (1981 census)

| *PROVINCE* | *URDU* | *PUNJABI* | *PUSHTO* | *SINDHI* | *BALUCHI* | *BROHI* | *HINDKO* | *SARAIKA* | *OTHERS* |
|---|---|---|---|---|---|---|---|---|---|
| Punjab | 4.3 | 78.7 | 0.8 | 0.1 | 0.6 | * | * | 14.9 | 0.1 |
| Islamabad | 11.2 | 81.7 | 4.2 | 0.2 | 0.2 | * | 0.6 | 0.1 | 1.8 |
| Sind | 22.6 | 7.7 | 3.1 | 52.4 | 4.5 | 1.1 | 0.3 | 2.3 | 6.0 |
| NWFP | 0.8 | 1.1 | 68.3 | 0.1 | * | * | 18.1 | 4.0 | 7.6 |
| FATA | * | 0.1 | 99.8 | 0.1 | * | * | * | * | * |
| Baluchistan | 1.4 | 2.2 | 25.1 | 8.3 | 36.3 | 20.7 | 0.1 | 3.1 | 2.8 |
| Pakistan | 7.6 | 48.2 | 13.2 | 11.8 | 3.0 | 1.2 | 2.4 | 9.8 | 2.8 |

**Less than 0.05 percent. Source: Federal Bureau of Statistics, Statistics Division, Government of Pakistan.*

with 10.4 million in 1951. The rapid growth of the labor force mirrors the high population growth rate and the tendency of school-age children to work. In 1985, an estimated 21 percent of all 10-to-14-year-olds and just over 40 percent of all 15-to-19-year-olds worked.

Agriculture, including forestry and fishing, employs the vast majority of the country's labor force, although in increasingly smaller proportions. In 1983, about 55 percent of all workers were involved in agricultural activities compared to 57 percent in 1972. The proportion of the labor force involved in mining and manufacturing grew slowly from 12.9 percent in 1972 to 13.7 percent in 1983, in the trade industry from 10 percent to 11 percent, in construction from 3.4 percent to 4.2 percent, and in public utilities from 0.4 percent to 0.5 percent. Those working in the transport and communications sector remained at 4.7 percent, while the proportion of workers in other services declined from 11.2 to 10.3 percent.

Unemployment rose slightly from an estimated 3.1 percent in 1981 to 3.5 percent in 1983. Unemployment struck twice as hard at women--7.5 percent in 1981--although women made up less than 4 percent of the total work force. Only 3 million of Pakistan's over 44 million women worked in 1985.

Although most workers have the right to form and join unions, only about 7 percent of the work force is organized. Union workers stage slowdowns and walkouts although labor laws prohibit industrywide collective bargaining and strikes.

Pakistanis are encouraged to seek work abroad. An estimated 1.5 to 2 million male Pakistanis did just that in 1983. Most went to Arab oil countries and worked construction. In 1983, Pakistani workers abroad sent $2.6 billion home, up from $2.2 billion in 1982. This trend is expected to abate, however, if world oil prices remain depressed.

Marked by years of rapid growth alternating with periods of virtual stagnation, the Pakistani economy is currently on the upswing. In 1985, government controls to curb inflation and favorable farming conditions brought about a record rise in the Gross Domestic Product (GDP) of 8.4 percent.

The largest share of the economy belongs to the service industries, accounting for 45.8 percent of the GDP in 1985. Although agriculture grew by a record 9.9 percent in 1985, its share of the GDP declined to 24.7 percent from 27 percent in 1983. Agriculture--the traditional foundation of the economy--is slowly giving way to manufacturing. Manufacturing gained the largest share of the GDP, growing from 20.1 percent in 1983 to 21.1 percent in 1985.

Imported consumer goods are cost prohibitive to the average Pakistani. In 1983, total consumer expenditure per person averaged only $294, or $1,471 per household. Total private expenditure amounted to about $26.5 million. In 1985, only 2 percent of households owned cars; 11 percent, refrigerators; 2 percent, washing machines; 3 percent, telephones; 6 percent, televisions; and 12 percent, radios. In 1982, sales of tape recorders, radios, and color televisions beat out other durables garnering $1.1 million, $0.6 million, and $0.4 million, respectively.

Imports of consumer goods come principally from Japan and the U.S. In 1985, despite the strong dollar, the U.S. share of the import market was 11 percent, second only to Japan. Imports of manufactured goods in 1982 were mainly articles of clothing ($135.7 million), toys and sporting goods ($32.9 million), articles of plastic ($20.9 million), watches and clocks ($16.8 million), and footwear ($9.4 million).

Imports of basic commodities in 1982 totalled about $5.2 billion. The import of fuels and lubricants led with $1.6 billion in sales. Machinery and transport equipment followed closely, totalling $1.2 billion. Basic manufactures accounted for $758 million in sales; chemicals, $539 million; oils and fats, $321 million; and crude materials, $292 million.

Excellent opportunities exist for

## TIPS ON TRADE

### Apple woos French computer market

What made Apple France the company's most profitable division outside the United States in 1985? Appealing to the French esprit, says the French division's director, Jean Calmon, in a recent issue of *France Today* (Volume 2, Number 1).

Setting up users' groups, or clubs, played up to the French love of exclusivity; the rainbow-striped apple on everything from T-shirts to jogging suits spoke to their fascination for labels and logos. French pride also had its day. Apple France's annual *concours*, or open call, for programs written by French programmers points to Apple's insistence on making its computers as French as possible. Apple France's computers offer French accents, letters, and punctuation marks on their keyboards.

But keeping its market share (nearly 21 percent of the market in 1985) means new strategies in 1986. The increasingly segmented French computer market--with dealers concentrating on a particular market niche --requires a sales staff with specialized skills and knowledge. Apple France's new technical sales support department aims to educate its 450 dealers (up from 15 in 1981) about new products and help them, in some cases, to sell and service specific accounts.

### Big winners in Japan's import market

Think of Japan. Geisha, computers, and sushi come to mind. But in this land known for its computers, America's Big Blue controls 40 percent of the computer market. IBM is not alone. Many American and foreign giants command major shares of the Japanese market.

According to the Japan External Trade Association, Schick controls 70 percent of the safety razor market; Pampers, 50 percent of the paper diaper market. Six out of every ten soft drinks sold in Japan are Cokes. Nestle dominates instant coffee sales with 60 percent of the market. Even tea gives way. Lipton sells 30 percent of the black tea consumed in Japan.

Other winners are Olivetti typewriters, with 35 percent of the market; Xerox photocopiers, with 20 percent of the market; Kodak photographic film, with 20 percent of the market; Pyrex heat resistant cooking ware, with 30 percent of the market; and Kleenex tissue paper, with 20 percent of the market.

### British buy better furniture

Imports of furniture increased about 25 percent from 1982 to 1983 in Britain with imports from the U.S. doubling during this period. The demand for furniture is expected to continue through 1987 with an emphasis on better-quality dining room, bedroom, upholstered, and self-assembled wood furniture •

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industrial sales of equipment suited for agriculture, the petrochemical and chemical industry, transportation, electric power generation, scientific research, hospital and health care, and communications. Airport construction, transport projects, and engineering projects also provide lucrative opportunities.

**SOURCES OF INFORMATION**

Numerous government documents containing census information as far back as 1947 and as current as the latest 1981 census are published by the Pakistan government in English. Contact Federal Bureau of Statistics, Publication and Publicity Section, 1-S.M.C.H Society, Karachi-3, Pakistan: telephone 439101/246.

All chambers of commerce and industrial trade associations in Pakistan are affiliated with the Federation of Pakistan Chambers of Commerce and Industry, St-28 Sharah-e-Firdousi, Block 5, Kehkeshan, Main Clifton, Karachi, Pakistan. To locate the trade organization applicable to a specific industry, contact it at the above address.

The U.S. Department of Commerce offers a number of useful publications. *Marketing in Pakistan* (OBR 82-01) and *Foreign Economic Trends* (FET 85-102) provide detailed economic and foreign trade information. Obtain both publications from the Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402; telephone (202) 738-3238. A list of all Country Market Surveys and selected International Market Research reports are published in the newest catalog of Market Research Division reports. To obtain a free copy, contact International Market Research Services, ITA/EPS, HCHB 1324, P.O. Box 14207, U.S. Department of Commerce, Washington, DC 20044; telephone (202) 377-2665.

Current information on marketing conditions in Pakistan is also available from the Commerce Department's trade specialists. Contact them at the following address: Pakistan Country Specialist, ITA/IEP, HCHB 2029-B, U.S. Department of Commerce, Washington, DC 20230; telephone (202) 377-2954. Euromonitor Publications Limited provides relatively current, difficult-to-obtain marketing data on Pakistan in its annual publication, *International Marketing Data and Statistics*. Contact Euromonitor Publications Ltd., 87-88 Turnmill Street, London EC1M 5QU.

The government of Pakistan is represented by its embassy in Washington and a consulate in New York. Contact the Pakistan Embassy, 2315 Massachusetts Avenue, N.W., Washington DC 20008; and the Pakistan Consulate General, 12 E. 65th Street, New York NY 10021. •

*--Linda Newcomb*

*Linda Newcomb is a freelance writer who has lived and worked overseas.*

FEATURE

# How French women see themselves

Bardot, de Beauvoir, and Deneuve--faces everyone sees as French. But how closely do French women identify with these icons of French womanhood and the values they represent? *Plurielles*, a new study conducted by two of France's leading research groups, reveals French women as they see themselves. This study--said to be the first on a large scale to probe attitudes and behavior of French women beyond their consumer patterns and place in society at large--found ten types of mesdames and mesdemoiselles among its 1200 participants aged 13 to 70. There are about 22 million women in France aged 13 to 70.

### *The Keepers of the Flame*

Liberation to the wind, *Plurielles* found a surprising 20 percent of French women believing that a woman's place is in the home. Most in this group saw their husbands as rulers of the roost. Catering to their husbands' and children's needs took precedence in their lives. For many in this group, love took second place to social stability in marriage. Mother Teresa and singer Linda de Suza--a top entertainer who arrived in France as a penniless immigrant and who espouses traditional values--appeal to this group.

### *The Transitionals*

Valuing home and children more than careers, the Transitionals walk in the shoes of their mothers while encouraging their daughters to step out and profit from the changed work climate. Women from this group (the second largest category at 13 percent) approve of job advances for women while holding more conventional attitudes for themselves. The prominent radio talk show moderator Eve Ruggieri matches their self-image.

### *The Congenials*

Sensual and receptive, women in this group strike a balance between values such as home and family and work as a means of gaining recogniition. Major French news broadcaster Belgian-born Christine Ockrent, is admired by these women.The Congenials account for 11 percent of study participants.

### *The Unfulfilled*

The Unfulfilled feel that their sacrifices for home, family, and husband go unrecognized. The homes where they are workaholics imprison them. Although the Unfulfilled adhere to traditional roles, they are jealous of women with an active professional life. The film actress Catherine Deneuve appeals to this group, which accounted for 10 percent of survey respondents.

### *The Torn*

Traditional and more liberated values tug at this group, which makes up 9 percent of survey participants. Economic necessity forces these women into the workplace at the expense of living a fully enriched personal life. A more liberated lifestyle is still down the road for them. Princess Caroline of Monaco symbolizes their ideals.

### *The Competitors*

Women in this group see a job as a way out of the homemaker role. Very active and pugnacious at work, they prefer aggressive women to overly feminine ones. Making up 9 percent of survey respondents, they identify with leading French conservative politician Simone Veil.

### *The Homemakers*

The Homemakers revolve their lives around home and family. According to the study, this group of women is France's most contented flock. Very religious, they reject both abortion and birth control. Not all new trends pass this group by, however. The Homemakers are very conscious of good health and fitness. Making up 8 percent of survey participants, the Homemakers identify strongly with Mother Teresa.

### *The Explorers*

The lives of these women are rich with activities they explore for personal satisfaction. They are determined to succeed at work which, like marriage and family, is an ingredient for happiness, not an end in itself. Simone de Beauvoir appeals to this group making up 8 percent of survey participants.

### *The Improvisers*

Accounting for only 6 percent of women surveyed, this group leads an unstructured life, improvising from day to day, enjoying the unexpected. The Improvisers shun responsibility and traditional values but are unhappy casting about for self-fulfillment. Jane Birkin, a British-born actress living in France, typifies their ideal.

### *The Baby Dolls*

Brigitte Bardot is their role model. Although they demand attention from men, the Baby Dolls are willing to admit that men are superior to women. Only 6 percent of respondents identified with this group.

*Plurielles* was developed and conducted jointly by the nine-year-old

*Institut Francais de Demoscopie (IFD)* and *Agence Femmes Information (AFI)*. The study represents a departure from previous research on French women that focused on specific consumer behavior at targeted sociocultural levels, according to Marianne de Souza, an IFD director. *Plurielles*, says Souza, not only updates data on consumer attitudes but also explores the life of French women in depth and reports on personality traits, sexual attitudes, budget management, approaches to work, advertising perceptions, and the feminist movement.

The initial qualitative phase of *Plurielles* research found five poles around which French women organize their lives--home, the couple, children, work, and self. Thirty-five individual interviews were conducted in the Paris area, in the northern city of Lille, at Rouen, northwest of Paris, at Niort in the western Deux-Sevres department, and at Marseilles on the Mediterranean coast. Interviews ran for two and one half hours. Three-hour group sessions were held in Paris--one with working women, one with nonworking women. An additional session with nonworking women was conducted in Rouen. For the quantitative phase, 1200 women aged 13 to 70 responded to a questionnaire designed to discern a wide range of attitudes and activities.

The entire *Plurielles* study is available for $25,000. This includes seven separate documents detailing the qualitative phase, data analysis leading to definitions for the ten types of women, and individual quantitative reports related to the home, consumer patterns, involvement in city life, values, and media. Portions can be obtained separately. For more information, contact Institut Francais de Demoscopie, 26, rue de Chambery, 75015 Paris, France; telephone, (1) 48.42.60.00; telex, 204986-F. AFI, which can supply additional information on French women and the European Community in general, is located at 9, cite de Trevise, 75009 Paris; telephone, 45.23.45.24. •

*Peter Inserra*

FEATURE

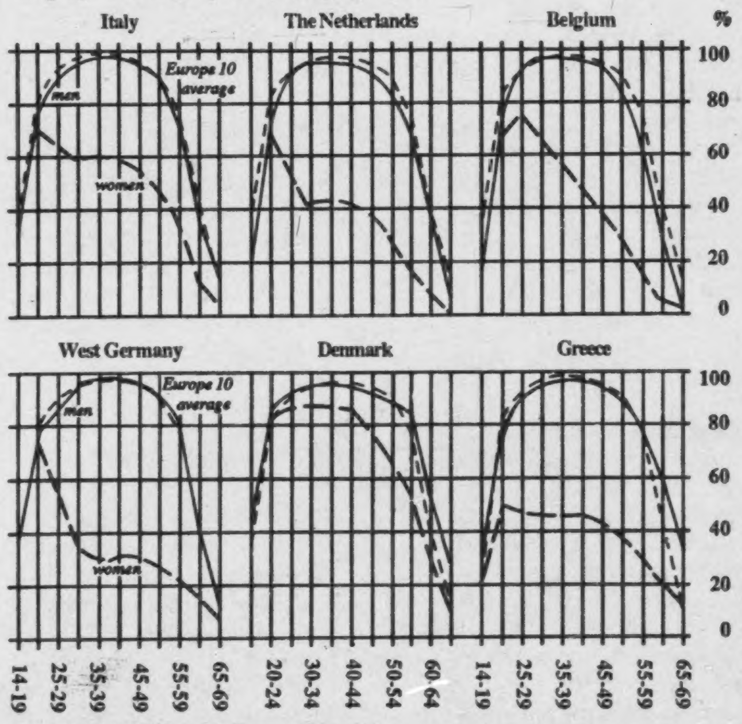
# Women bring up employment rates in the European community

New statistics from the European Community labor force survey place 54 percent of persons aged 14 or over in the Community having a job or seeking one in 1983. The proportion of men in the labor force was 70 percent; the proportion of women, 40 percent.

Countries with high activity rates included Denmark (64 percent), the U.K. (58 percent), and France (56 percent), owing largely to the high employment rate among women (57 percent in Denmark and 45 percent in the U.K. and France). These figures compare to the U.S. activity rate of 64 percent in 1983, with a 53 percent rate among women.

Among men in the Community, Ireland came out tops with a 74 percent activity rate, but its very low activity rate among women (33 percent) pulled it below the Community average for men and women as a whole.

Generally, the childrearing years--the first 10 years of marriage--remove women from the labor force. The activity rate for women peaks at about 70 percent in the 20-to-25 age group, then drops steadily until the 30-to-35 age group is reached. After marriage, the activity rate among women in the Community drops from 48 percent to 42 percent. Denmark, Belgium, and France prove to be exceptions, where figures of 58 percent, 34 percent, and 65 percent rise to 65 percent, 40 percent, and 50 percent, respectively.



**EC women workers break for childrearing**

Employment activity rates by age groups

*Source: Statistical Offices of the European Communities*

**Employment rates in selected population groups, 1983 (in percent)**

| | | West Germany | France | Italy | Netherlands | Belgium | Luxembourg | United Kingdom | Ireland | Denmark | Greece | Europe |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total | Total | 50.8 | 51.9 | 45.0 | 44.0 | 43.9 | 47.7 | 51.4 | 45.7 | 58.1 | 47.0 | 49.3 |
| | Male | 66.3 | 64.7 | 63.8 | 59.7 | 59.5 | 66.1 | 63.2 | 63.2 | 65.2 | 66.6 | 64.2 |
| | Female | 37.1 | 40.4 | 27.7 | 28.7 | 29.3 | 30.4 | 40.4 | 28.1 | 51.3 | 29.2 | 35.6 |
| Young, 14-24 years | Total | 45.1 | 38.7 | 31.3 | 35.0 | 30.6 | 48.2 | 46.7 | 43.0 | 48.4 | 30.1 | 39.9 |
| | Male | 48.2 | 43.8 | 37.2 | 34.0 | 34.0 | 50.4 | 49.4 | 45.5 | 51.0 | 37.8 | 43.8 |
| | Female | 41.9 | 34.0 | 25.6 | 35.8 | 27.1 | 45.8 | 43.9 | 40.4 | 45.7 | 23.4 | 36.0 |
| Single persons | Total | 49.9 | 46.4 | 40.1 | 41.2 | 33.2 | 52.7 | 48.5 | 49.6 | 55.0 | 40.3 | 45.6 |
| | Male | 54.0 | 52.1 | 48.4 | 42.7 | 38.6 | 56.3 | 52.1 | 52.8 | 59.3 | 47.7 | 50.8 |
| | Female | 45.1 | 40.1 | 30.9 | 39.3 | 26.5 | 48.3 | 44.3 | 45.5 | 49.9 | 31.8 | 39.6 |
| Married | Total | 56.6 | 59.1 | 51.6 | 49.1 | 51.4 | 50.4 | 58.1 | 46.9 | 66.1 | 53.6 | 55.7 |
| | Male | 74.1 | 72.3 | 73.5 | 70.3 | 70.1 | 73.2 | 70.8 | 73.8 | 71.6 | 75.5 | 72.6 |
| | Female | 39.4 | 45.7 | 29.9 | 27.8 | 33.4 | 27.2 | 45.4 | 20.2 | 60.5 | 32.0 | 38.8 |

*Source: Statistical Office of the European Communities.*

Figures vary widely from country to country for women returning to the workplace after raising their children. In the U.K., women return to the workplace en masse, with the 40-to-50 age group registering the highest activity rate among women, hovering around 70 percent. In the Netherlands, Belgium, Luxembourg, and Ireland, however, female employment falls sharply after the age of 30.

Among men, in contrast to women, marriage increases the activity rate. The Community average for men after marriage rises from 60 to 76 percent. Young men stand out with low activity rates due to their participation in higher education, vocational training, or the military. Over 95 percent of men between the ages of 30 and 55 in the Community had a job or were seeking one.

Thirteen million persons in the Community are part-time workers, of which 11 million are women. Part-time workers make up about 12 percent of the total work force. About 9 million part-time workers are married. Italy, Belgium, Luxembourg, Ireland, and Greece have the fewest part-time workers, with barely 5 percent of the workforce employed part-time. The proportion of part-timers in the labor force of Denmark, the U.K., and the Netherlands, in contrast, registers a high for the Community of about 20 percent each.

These statistics were compiled by the Statistical Office of the European Communities, L-2920 Luxembourg-Kirchberg, rue Alcide De Gasperi, Batiment Jean Monnet; telephone, 43011; telex, Comeur Lu 3423. They were published in the January 1986 edition of *Eurostat News*, a quarterly publication. •

## PUBLICATIONS

**A Half Step Behind: Japanese Women of the '80s**, by Jane Condon, 1985, New York: Dodd, Mead & Company, 319 pp., $16.95 hardbound.

Noriko Aoki, a 36-year-old Japanese Yuppie, had an arranged marriage. Each family hired a detective to check up on the other family. Noriko didn't mind at all, feeling it was expensive but worth it to ensure the success of her marriage.

Miki Suzuki called off her days-away wedding after meeting her husband-to-be's conservative parents for the first time. Distressed by the failure of her love relationship, she now is considering an arranged marriage.

What is remarkable about these stories is not in their telling but the candor in their telling. For the Japanese, "truth" is a variable. *Tatemae* is the surface truth, the version molded to fit society's needs. *Honne*--the real truth--is rarely told, especially if it involves an individual's personal opinions.

In the interviews that make up *A Half Step Behind*, Jane Condon reveals the hidden truths of life as a Japanese woman. Teachers, students, housewives, career women, blue-collar workers, and entertainers among others speak out about their marriages, their families, about divorce and widowhood, about their education and the education of their children, and about the jobs they hold.

It's a rare look at the real Japan, one most worth taking.

**Urban FSA and Rural Postal Code Summary Data, 1984, No. 17-602,** Statistics Canada, Ontario, Canada.

This publication is an excellent tool for market researchers and direct-mail marketers. It provides a portrait of the tax filers of 7,000 specific postal code areas. The data present population characteristics for 27 variables, including age group, sex, income, and labor force status. One thousand urban Forward Sortation Areas (FSA, the first three characters of the postal code) and 6,000 rural postal codes are described.

Five editions are available: one for all of Canada and one for each of the four major regions. The Canada package (No.86-000) is $295. Remaining issues are $112 per region: Alantic Provinces (No. 86-001); Quebec (No. 86-002); Ontario (No. 86-003); and Western Provinces and Territories (No. 86-004). Order from: Statistics Canada, Publications Sales and Services, Ottawa K1A OT6, Canada. •

FEATURE

# Media Advertising in Japan

In 1981, Japan spent well over $10 billion on media advertising. By 1983, this figure had risen to $11.6 billion. This ranked Japan second only to the U.S. in total advertising expenditures.

The largest share of advertising expenditure in Japan in 1981, just over 34 percent, went to TV, up from 32 percent in 1971. The newspaper share of advertising expenditure was nearly 31 percent, followed by direct mail and outdoor advertisements at just under 22 percent. The radio share was about 5 percent; the magazine share, about 6 percent.

Japan has 48 VHF and 51 UHF television stations for a total of 99 stations that operate through the sale of commercial broadcast time. As of 1982, the cost of prime time--between 7 and 10 p.m. weekdays and on Saturday, and from 6 to 10 p.m. on Sunday--was about $7000 for 30 minutes of sponsored time and about $2800 for a 15-second spot. Additional costs are required for broadcasting over a national network instead of just in the area served by the TV station.

Newspaper ads often come in the form of *orikomi*, a peculiarly Japanese fold-in ad. As most newspapers are delivered to homes rather than bought at newsstands, newspaper delivery companies accept separately printed, single-sheet ads which they fold into newspapers before delivering them. About 80 percent of *orikomi* advertisers are retailers such as local stores, supermarkets, or department stores. Distribution costs for 3,000 sheets in 1981 ran from about $30 to $50.

Another way to reach the Japanese consumer is through printed advertisements on railway cars and buses. In the Tokyo area alone, commuter trains carried about 10 billion riders in 1980. Since commuters log in an average of three hours a day going to and from work, transit advertising has a captive audience. Rates for transit advertising vary according to the number of commuters who ride the line. On Japan National Railway's Chuo Line--one of Tokyo's most crowded commuter lines--two days with 1730 posters (one poster per car) cost nearly $3000 in 1981.

As in other countries where the mass media are highly developed, products sold primarily by the particular image they project are the most heavily advertised in the Japanese media. Pharmaceuticals, cosmetics, soap, electric appliances, and leisure-time products dominate the major media. The higher level of advertising expenditure on housing, however, sets Japan apart.

Nondurable, everyday items rely heavily on radio and television spots in Japan. About one-half of television and radio advertising expenditure in 1981 went for clothing, pharmaceuticals, appliances, foodstuffs, and cosmetics and soaps.

Newspapers and magazines, on the other hand, were dominated by ads for housing and construction materials, machinery, books, and financial organizations. Foods and beverages, however, were heavily advertised in magazines, accounting for 15 percent of all magazine ads.

Point of Purchase (POP) advertising is gaining popularity with retailers, particularly specialty stores. The lack of floor space in Japan's typical retail store does present a problem however. Not all POP materials supplied to retailers are displayed. The Japan External Trade Organization (JETRO) therefore advises potential users of POP ads to coordinate the use of POP ads with other types of advertising such as in newspapers or on TV.

*--Denise Rusoff*
*Source: JETRO*

## COMING UP

**Belgium:** A heavily industrialized country at the hub of Europe

**Japan's coming import boom:** How consumers view imports

International Demographics
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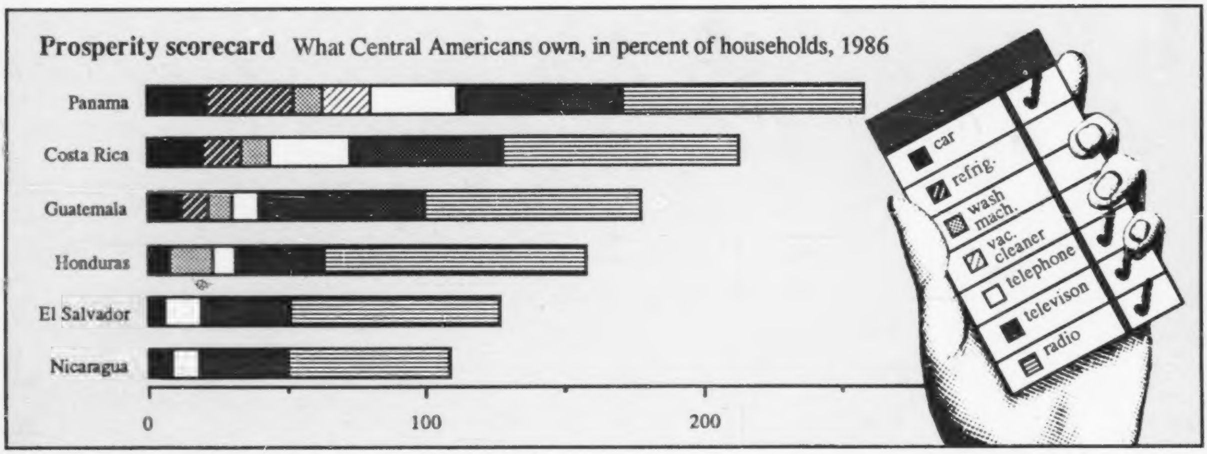
CONSUMER TRENDS AND MARKETS ABROAD
AUGUST 1986 VOLUME 5, NUMBER 8

# International Demographics



**Prosperity scorecard** What Central Americans own, in percent of households, 1986

*Source: International Marketing Data and Statistics 1986-87, Euromonitor Publications, Ltd.*

COUNTRY PROFILE

## The Republic of Panama

Panama has what no other Central American country save Costa Rica has--clean water, good health services, ready transportation, disposable income, and social stability. Nutured by its unique geography, Panama has become the world's second largest trading center (after Hong Kong) and Latin America's busiest banking center.

Panama is prosperous (relative to its neighbors), literate, and urbanized. It stands out in sharp contrast to its Central American neighbors with respect to such main indicators of standard of living as average daily caloric intake, infant mortality rate, population per health care person, per capita income, total fertility rate, life expectancy, and percent of population under 15.

But it also has problems. The slump in international demand and price for sugar and bananas--Panama's main agricultural exports--and in demand for petroleum products following the 1973 oil crisis sent Panama into an era of economic recession in 1981. Internal and external debt, unemployment, high labor costs, and a rising trade deficit worsen Panama's chances for significant economic growth in the near future.

Economic stagnation is expected to persist unaided by traditional revenues from the Panama Canal and export earnings from the Colon Free Trade Zone, which are also falling. As in the rest of Central America, Panama experienced high rates of economic growth and rapidly rising real per capita income between 1950 and 1978. However, since 1980, real per capita output has stagnated, and GDP growth has fallen. Real annual GDP growth fell from 7.3 percent between 1968 and 1973 to 1.7 percent between 1973 and 1977. Between 1978 and 1982, however, faltering GDP growth recovered to 4.4 percent annually.

*continued*

INSIDE

Demographic tensions in Central America....5
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Central American consumer information....11

THIS MONTH: PANAMA

Panama's assets--its location at the crossroads of world trade, open financial system, relatively skilled labor force, adequate infrastructure, and experienced export-oriented commercial sector--give Panama more of a chance at recovery from Latin America's overall economic crisis than its neighbors. According to a World Bank report, renewed growth depends upon export-oriented, labor-intensive investment.

C O M P A R A T I V E L Y S P E A K I N G

Illustration by Diana Souza

***Among Panama's working-age population, women predominate in urban areas and men predominate in rural areas.***

C O M P A R A T I V E L Y S P E A K I N G

**POPULATION GROWTH**

Panama has the smallest and slowest-growing population in Central America. But even so, its 1985 population of about 2,180,500 more than doubled its 1960 population of only 25 years previous. Between 1965 and 1973, Panama's population grew at an annual rate of 2.7 percent. This rapid growth reflected high birthrates of over 40 per 1,000 population and gave Panama one of the highest urban densities in Central America.

However, by the period 1973 to 1983, the rate slowed to 2.3 percent due to sharply falling mortality rates and a dramatic decline in the birthrate. Mortality rates fell from over 10 per 1,000 in 1960 to 5.3 per 1,000 in 1983 due to improved public health and medical advances.

Birthrates de-clined sharply from 40 per 1,000 in the 1960s to 36 per 1,000 between 1975 and 1980. This drop reflects high contraceptive prevalence rates.

At present, more than 60 percent of married Panamanian women of childbearing age use modern contraceptives, making Panama's current birthrate of 28 per 1,000 Central America's lowest. Estimates now peg Panama's growth rate at 1.9 percent annually for the period 1980 to 2000. By the year 2000, Panama is expected to have about 3 million people.

As for the rest of Central America, Panama's population growth crisis is intensified by its rapid pace of urbanization. Fifty-four percent of the total population in 1980 lived in the cities (up from 44 percent in 1965), with 66 percent of the urban population living in Panama City. The economic boom years of 1965 to 1973 saw cities growing at 4.1 percent annually as rural residents migrated to the cities for work. The rate slowed in the period 1973 to 1983 to 3 percent due to the economic downturn following the 1973 oil crisis.

Despite declines in Panama's death rate and birthrate, the Panamanian population continues to grow rapidly due to more infants surviving into their childbearing years. Panama's infant mortality rate in 1985 was 26 per 1,000--one of Central America's lowest and comparable to the U.S. rate of 11 per 1,000.

**ETHNICITY AND RELIGION**

About 60 percent of Panamanians are mestizo or mulatto (mixed white and Indian, or white and black); 14 percent, black;12 percent, white; 7.5 percent, Indian; and 1 percent, Oriental. Ninety percent of Panamanians speak Spanish, but English is a common second language. Indians retain their native languages. In 1980, 89 percent of the population was Roman Catholic.

**ADMINISTRATIVE DISTRICTS**

The Republic of Panama has an area of 77,082 square kilometers (29,761 square miles). Its famous 50-mile Panama Canal affords the world an international shortcut linking East and West. Panama is divided into nine administrative provinces, each headed by a governor appointed by the president. However, population and commerce are centered around the metropolitan corridor in Panama Province flanking the Panama Canal.

In 1985, more than 54 percent of Panama's population (about 1.2 million people) lived in the metropolitan area, or the urban provinces of Panama and Colon. By the year 2000, this percentage is projected to rise to nearly 57 percent of the total population. Panama Province by far holds the bulk of the population, about 45 percent in 1985 (1 million people); Colon, only about 9 percent, or 196,000 people.

Due in part to employment-induced migration from the construction of the trans-isthmian oil pipe-

**International Demographics**

PUBLISHER: DORIS WALSH EDITOR: DENISE RUSOFF ART DIRECTOR: CAROL TERRIZZI

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line, Chiriqui Province is Panama's second most populous province. Chiriqui Province is home to nearly 16 percent of Panama's population, about 346,000 people. The mainly agricultural provinces of Veraguas (population, 203,900), Cocle (159,000), Herrera (98,200), Los Santos (80,600), Bocas del Tora (73,300), and Darien (36,100) follow.

### WIDE GAPS

Panama's income-distribution estimates are some of Central America's most skewed. The gap between rich and poor is greater than any other Central American country's save El Salvador's. In 1980, the poorest 20 percent of Panama's total population received only 2.7 percent of total income, or $120 average per capita income. The richest 20 percent garnered 60.3 percent, or $2,710 per capita--Central America's largest per capita figure.

Poverty, however, is still a serious concern, especially in rural areas. One out of every two Panamanians is estimated to be extremely poor or unable to satisfy basic needs.

Although the gap is great, Panama has made significant gains in nutrition and health. The average Panamanian's daily calorie supply, for example, of 2271 calories, amounts to 103 percent of the minimum requirement. Health services top those of all other Central American countries. Whereas in Costa Rica--Panama's closest economic equal--there is one physician for every 1,460 people and one nursing person for every 450 people, in Panama the figure drops to 980 and 420 people, respectively.

Panama has invested heavily in a national sanitation program to provide safe drinking water to a projected 85 percent of its total population by 1988. Heavy expenditure on health since the 1970s has resulted in a rapidly falling infant mortality rate, from about 40 per 1,000 live births to 26 per 1,000.

Strong government support for public education in the 1970s led to a 60 percent increase in the number of students enrolled in public schools at all levels between 1970 and 1974. During the same period, enrollment at the secondary level increased 57 percent; at the university level, 154 percent. Quality of education also improved. The ratio of primary students per teacher from 1960 to 1982 went from 30 to 1 to 27 to 1; at the secondary level, 23 to 1 to 19 to 1. In 1960, there were an average of 4 teachers per primary school. By 1982 there were 5. Secondary school teacher-per-student ratios improved dramatically. In 1960, there were 13 teachers in each school; by 1982 there were 28.

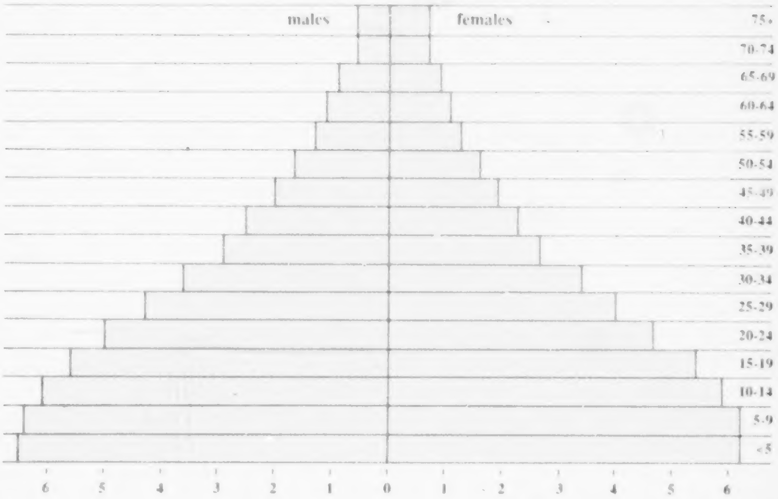
In 1981, a full 100 percent of primary school-aged children were enrolled in primary school, 65 percent of secondary school-aged children were enrolled, and 27 percent of those aged 20 to 24 were enrolled in higher education.

### LABOR AND UNEMPLOYMENT

Panama's relatively skilled, productive, and often bilingual labor force is one of its most important comparative advantages. This asset, however, goes increasingly untapped, plagued by continued high unemployment rates. About 1,140,600 Panamanians work--over half in the metropolitan area (transit zone).

Panama's all-time high unemployment rate is estimated at 10 percent nationwide, with the young hardest hit. Less than 10 percent of those who became 15 years of age between 1978 and 1982 found paid employment. For those under 25, the

**Population of Panama by age and sex, 1985** *(in percent)*



| *Age* | *Males* | *Females* |
|---|---|---|
| <5 | 132,000 | 126,000 |
| 5-9 | 130,000 | 126,000 |
| 10-14 | 124,000 | 121,000 |
| 15-19 | 114,000 | 110,000 |
| 20-24 | 101,000 | 96,000 |
| 25-29 | 87,000 | 82,000 |
| 30-34 | 74,000 | 70,000 |
| 35-39 | 59,000 | 56,000 |
| 40-44 | 50,000 | 47,000 |
| 45-49 | 40,000 | 38,000 |
| 50-54 | 34,000 | 33,000 |
| 55-59 | 27,000 | 27,000 |
| 60-64 | 23,000 | 23,000 |
| 65-69 | 18,000 | 18,000 |
| 70-74 | 13,000 | 14,000 |
| 75+ | 12,000 | 15,000 |
| Total | 1,038,000 | 1,002,000 |

Panama
MEXICO
CARIBBEAN SEA
PANAMA CANAL
Colon
Panama
Bocas Del Toro
Colon
Panama
Cocle
Chiriqui
Veraguas
Herrera
GULF OF PANAMA
Darien
Los Santos
COLUMBIA

unemployment rate was about 21 percent in 1982. In 1982, 22 percent of 15-to-19-year-olds and 19 percent of 20-to-24-year-olds were out of work. Rates fell significantly in the 30-to-39 age group (4 percent unemployment) and hovered around 2 percent for persons aged 40 and over.

Except for declining participation rates due to increased enrollment in secondary and tertiary education, a reduced voluntary retirement age (from 62 to 55), and a falling women's participation rate, unemployment could have reached 20 percent in 1983.

Participation rates for all men of employable age (15 to 60 and over) nationwide continued a downward trend from a high of 87 percent in 1974, to 78 percent in 1978, to 76 percent in 1982. Women's rates followed suit, down from 32 percent in 1974 to 30 percent in 1982, after rallying in 1979 to a high of 35 percent.

As for most Latin American countries, women's participation rates are higher in urban areas than in rural areas due to greater opportunities that women find for work in the cities. However, women's urban jobs are often in the service sector, with low pay and prestige. In 1982, 21 percent of urban women between 15 and 19 were in the workforce as opposed to 19 percent nationwide. For those aged 20 to 59, 44 percent of urban women worked in contrast to 37 percent nationwide.

More young men tend to work in urban areas than in the countryside. In 1982, more men between 15 and 19 were in the labor force in the metropolitan areas than nationwide--37 percent versus 27 percent, respectively. Participation rates for men aged 20 to 59 in urban areas, however, were about equal to nationwide rates--90.5 percent to 91.9 percent respectively.

Participation rates for the working age population declined from 60 percent in the early 1970s to just over 50 percent in 1982 and 1983. Between 1976 and 1982, Panama's working age population grew at 3.7 percent annually (4.1 percent in the metropolitan corridor). The growth rate is expected to fall after 1985 due to decelerating overall population growth.

Unemployment is currently near 12 percent in the Panama City/Colon Metropolitan Area. Panama City's unemployment partially comes from the general economic slump, while Colon's is chronic and long term. Colon's working age population, estimated at near 80,000 people, greatly outweighs the 30,000 estimated jobs in the formal sector--a significant portion of which are held by commuters from Panama City. Almost one out of every four working-age people are unemployed in Colon.

To absorb additions to the labor force, the economy needs to grow by some 7.5 percent annually given the current institutional and legal framework in which the labor market operates, according to a World Bank report.

As in many other Central American countries, the percentage of the Panamanian labor force in agriculture is decreasing (from 46 pecent in 1965 to 33 percent in 1981) and the proportion in services (retailing, transport, and commerce) is increasing (39 percent in 1965 to 49 percent in 1981). Only 10 percent of the Panamanian labor force worked in manufacturing in 1980.

### HOUSING AND HOUSEHOLDS

In 1980, Panama had 364,325 dwellings, of which about 76 percent were individual houses, about 13 percent were apartments, and about 10 percent were blocks of flats. Dwellings averaged 2.5 rooms per unit. About 70 percent of units were owner occupied; about 21 percent were rented. The 582,000 households in 1981 averaged 5.3 persons per household.

Housing is an ongoing problem in Panama's urban areas. The shortage of low-income housing remains acute. Fifteen percent of the transit-zone population is estimated to be housed in squatter settlements.

### SOURCES

Comparative demographic statistics for Panama and all of Central America can be obtained from *Conflict in Central America: The Demographic Dimension* by Sergio Diaz-Briquets, a publication of the Population Reference Bureau, Inc. Copies can be obtained at $3.00 per single copy from the Circulation Department of the Population Reference Bureau, Inc., P.O. Box 35012, Washington, DC 20013. Another useful publication is *Panama: A Country Study*. Obtain from Government Printing Office, Washington, DC.

For information on Panama's economic adjustment process, see A World Bank Country Study, *Panama: Structural Change and Growth Prospects*. This report contains up-to-date information on Panama's economy and suggestions for its future course. Obtain from World Bank Publications, P.O. Box 37525, Washington, DC 20013 for $20.

See the special report on page 11 for a detailed description of *Consumer Markets in Central America* , an extremely useful source of current data on Central American consumers. This publication also contains in-depth market statistics for Panama. •

REGIONAL SYNOPSIS

# Demographic Tensions in Central America

## ■*RAPID POPULATION GROWTH*

Central America faces a historic rise in population. Starting in the 1950s, significantly large absolute numbers began to combine with high rates of growth, to create explosive population growth that adds an ill-timed crisis to an already strife-ridden landscape. Between 1950 and 1985, Central America's population tripled in size, from 9.1 million to 26.4 million due to steep mortality declines and the absence of off-setting fertility declines.

Central America's population crisis is shared by most of the developing world. However, the distribution of Central America's growing populations sets its population growth apart from that of other developing regions. Beginning around the 1950s, Central Americans set out in ever-accelerating numbers for urban centers. Rural-to-urban migration coupled with high rates of natural increase due to rapidly falling death rates and consistently high birthrates swelled urban populations. At present, almost half of all Central Americans live in cities.

About 52 percent of Panama's population lives in urban areas; Costa Rica, 48 percent; El Salvador, 45 percent; Guatemala, 40 percent; Nicaragua, 42 percent; and Honduras, 36 percent. In contrast, only 3 percent of Bangladesh's population is urban; China,14 percent; India and Indonesia, 11 percent; Pakistan, 15 percent; and Sub-Saharan Africa (except South Africa), 9 percent. Rates of urban population growth in Central American countries consistently outpace those of total population growth. Between 1975 and 1980, cities in Nicaragua grew at an annual rate of about 4.4 percent, while total population grew at 2.8 percent; cities in Honduras, 5.7 percent, total population, 3.5 percent; and cities in Guatemala, 4.0 percent, total population, 3.0 percent.

Although the average growth rate for Central American countries has fallen and is expected to fall further, the decline is not near enough to counterbalance the effect of the absolute rise in population numbers. The average annual growth rate of more than 3 percent annually in the 1960s--the world rate averaged 2 percent in the same period--fell to about 2.6 percent in recent years. This decline, however, is due mainly to declines in socioeconomically advanced Costa Rica and Panama.

Central America's age structure further complicates the population crisis. About 43 percent of Central Americans are under the age of 15. When the increasingly larger young population group enters its reproductive years, the potential for future growth (albeit the falling rate of population increase) is unparalleled. United Nations population projections peg the region's population at 40 million by the year 2000.

## ■*STAGNATING ECONOMY*

As for many other economies worldwide, the 1973 oil crisis began a downward spiral for the buoyant post-World War II Central American economy. Between 1950 and 1978, real per capita income growth in Central America doubled, with Central American economies growing an average of 5.3 percent annually. But, by the early 1980s, overseas markets of the trade-dependent countries of Central America had dried up due to protectionism abroad and slumping basic commodity prices.

These and other factors plunged Central America into its current economic malaise of falling real per capita income, rising unemployment, curtailed export-led economic growth, and a rising cost of living. The downturn in consumer spending intensified in the 1980s, reflecting the fall in real incomes of those employed in the formal sector. Only Panama and Nicaragua escaped a decline in real GDP during the period 1981 to 1983.

In general, economic growth in Central America disproportionately benefits high- and middle-income groups, thereby widening the already great gap between rich and poor. Income-distribution estimates for the region graphically portray the realities of inequality and privilege for the few. The poorest 20 percent of the region's population garner only 3.7 percent of the total income, whereas the richest 20 percent receive 57.4 percent of total income. El Salvador's income distribution is the most extreme with the poorest 20 percent of the population receiving only 2 percent of total income and the richest 20 percent of the population receiving 66 percent. Costa Rica's is the most equitable at 4 percent and 49 percent, respectively.

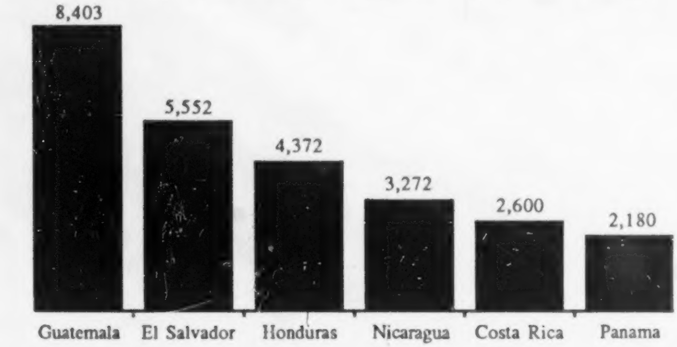
Average per capita income for the poorest 20 percent of Central Americans amounts to $90 a year (in 1970 U.S. dollars). Over half of Central Americans subsist on an average of $200 a year. United Nations estimates place 65.4 percent of the region's population in extreme poverty or unable to satisfy basic needs, with rural poverty far more severe than urban poverty. Costa Rica is a notable exception, with only 24.6 percent of the population estimated to be poor.

Central America's economic crisis is further intensified by the dramatic increase in the economically active population. Doubling in size from about 2.1 million in 1970 to 4.2 million in 1985, the labor force increasingly pressures an economy already weakened by high unemployment (estimated in all countries at 10 percent or higher) and underemploy-

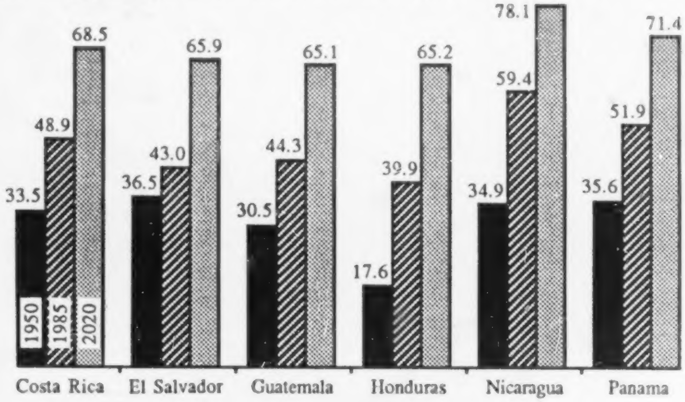
*continued on p. 8*

# REGIONAL OUTLOOK: POPULATI

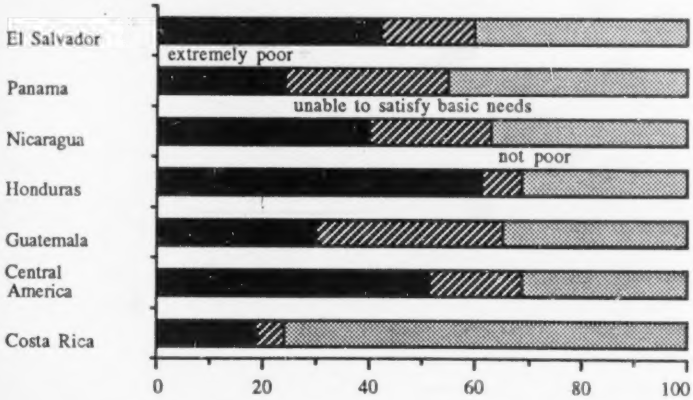
### Total Populations of selected Central American Countries, 1985



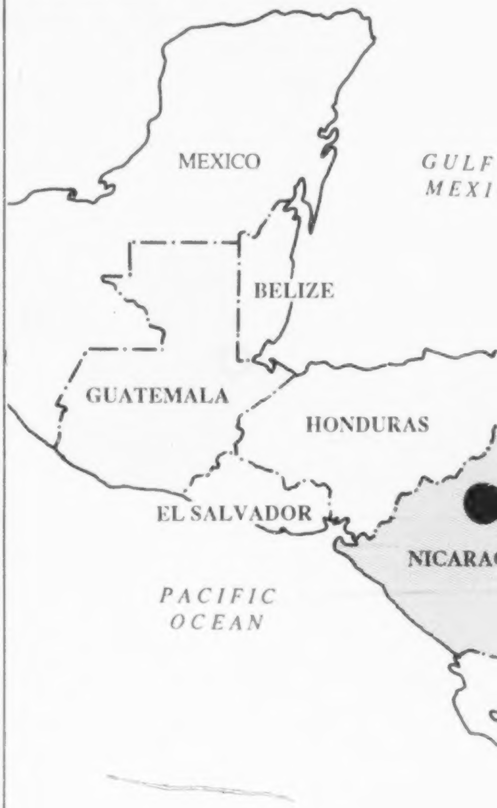
### Urban population in Central America in percent, 1950-2020



### Central American poverty estimates in percent, 1980



## Central America


MEXICO
GULF
MEXI
BELIZE
GUATEMALA
HONDURAS
EL SALVADOR
NICARA
PACIFIC OCEAN

☐ fastest growing
■ biggest per capita income
☐ most populous

| | pop. growth | per capita income ($) | |
|---|---|---|---|
| Nicaragua | 3.5% | 946 | 3. |
| Honduras | 3.1% | 683 | 4. |
| El Salvador | 2.8% | 700 | 5. |
| Guatemala | 2.5% | 1,209 | 8. |
| Costa Rica | 2.2% | 1,995 | 2. |
| Panama | 1.9% | 2,143 | 2 |

# N CRISIS IN CENTRAL AMERICA

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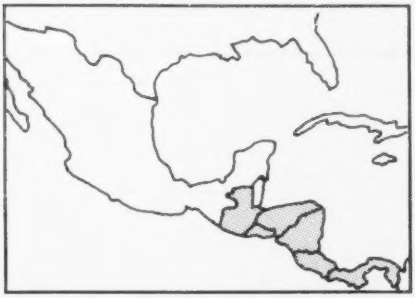
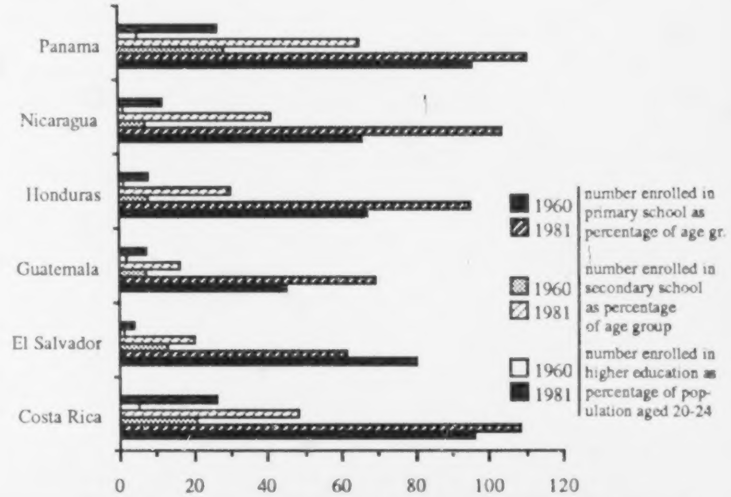
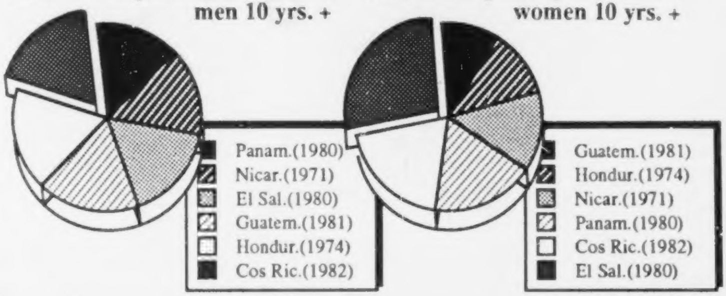


## Educational indicators of Central America

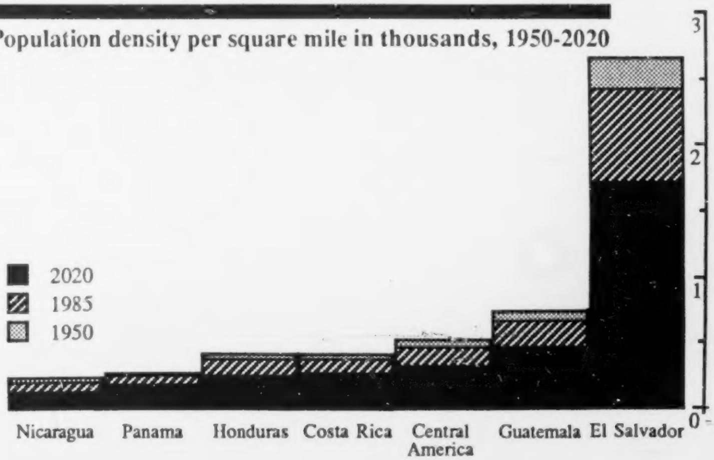


## Labor force participation rates, men 10 yrs. +

## Labor force participation rates, women 10 yrs. +



## Population density per square mile in thousands, 1950-2020



ment (estimated at over 30 percent).

### ■*CENTRAL AMERICA'S BETTER-OFFS*

Socioeconomically advanced Costa Rica and Panama are Central America's notable exceptions. Life expectancy at birth and infant mortality rates for these better-offs, for example, are comparable to those of developed countries.

COMPARATIVELY SPEAKING

Illustration by Diana Souza

***Central America's lowest population densities of 71 and 74 persons per square mile in Nicaragua and Panama, respectively, compare with Guatemala's 201 and El Salvador's 694.***

COMPARATIVELY SPEAKING

Life expectancy in Costa Rica (73 years) and in Panama (71 years) compares favorably to that of the U.S. (75 years). Infant mortality is 11 per 1,000 in the U.S., 20 per 1,000 in Costa Rica, and 26 per 1,000 in Panama. In contrast, life expectancy for other Central American countries hovers around 60 years with infant mortality rates three to four times higher than in Panama and Costa Rica.

Costa Rica's and Panama's death rates of 4.2 per 1,000 and 5.4 per 1,000, respectively, are almost half those of neighboring countries. Total fertility rates show similiar differences. In 1985, the average Costa Rican or Panamanian woman had about 3.5 children, while their Honduran counterpart had 6.5; Nicaraguan, 5.9; Guatemalan, 5.2; and El Salvadorian, 5.6. Accordingly, population growth rates for Costa Rica and Panama are lower than for other Central American countries. Population is still growing rapidly, however, due to greater numbers of women surviving into their childbearing years.

Costa Ricans by far enjoy the most equitable distribution of national income of all Central Americans. Although the poorest 20 percent of the Costa Rican population only garners 4 percent of total income, average per capita income comes to $177 (in 1970 U.S. dollars). In contrast, the poorest 20 percent of Hondurans might control a comparable 4.3 percent of total income, but that share only amounts to $81 per capita, about half the amount poor Costa Ricans receive. The richest 20 percent of Costa Ricans control 49 percent of total income (averaging $1,165 per capita)--the smallest share of total income for the richest 20 percent of the population for any Central American country.

Panama's income differential is one of the widest for all countries in its region (El Salvador's is the widest), but its relative wealth affords more for each of its citizens. The poorest 20 percent control a mere 2.7 percent of total income, but receive an average of $120 per capita. Only Costa Rica's poorest 20 percent receive more per capita. Panama's richest 20 percent of the population--controlling 60.3 percent of total income--tops all other Central Americans in per capita income at $2700. •

FEATURE

# What imports sell in Japan and why

The prospect of increased imports in Japan due to the rising purchasing power of the yen offers an unparalleled opportunity for American exporters. Not only can the yen buy more, but housewives should have more yen to spend.

Pressed to reduce Japan's trade surpluses, the Japanese government is enacting policies to stimulate spending such as expanding tax deduction for housing acquisition and reducing income tax to increase disposable income. In addition, shortening the work week to five days and reforming land laws to reduce the cost of home ownership are major parts of the initiative to transform workaholic Japan into a high-consumption society.

Recent consumer trends also spell good news for the future of imports. The trend toward increased total percentage of household expenditures for housing and leisure coupled with the move away from the purchase of standard items to items tagged to individual lifestyles adds up to a marketplace in which the role of imports becomes increasingly important.

The market may be ripe, but what do today's Japanese consumers think about imports and what are they buying? The soaring yen has yet to boost import sales significantly, but then wide-ranging price cuts have yet to reach the consumer level. This delay may not be the only culprit, however. Results of two recent surveys polling consumer attitudes toward imports and evaluating consumer purchasing and usage preferences point to some particular Japanese likes and dislikes affecting the current and potential sales of imports.

Quality and price mean most to the Japanese consumer--imported goods or not. This key finding of a

**Top 20 imports found in Japanese homes, 1986** *(usage rate in percent)*

| | |
|---|---|
| 1. Whiskey/Brandy | 69.7% |
| 2. Tea | 58.4 |
| 3. Perfume | 49.6 |
| 4. Tie/Scarf | 49.6 |
| 5. Chocolate/Candy | 48.5 |
| 6. Fountain Pen/Mechanical pencil | 44.5 |
| 7. Wine/Beer | 43.7 |
| 8. Coffee/Cocoa | 39.8 |
| 9. Cookies/Biscuits | 39.5 |
| 10. Handbag | 34.5 |
| 11. Knives/Scissors | 32.7 |
| 12. Cosmetics | 31.5 |
| 13. Jewelry/Accessories | 29.1 |
| 14. Dishes/Cutlery | 27.6 |
| 15. Cheese/Butter | 27.2 |
| 16. Sweater | 27.1 |
| 17. Timepiece | 26.9 |
| 18. Room Accessories | 24.0 |
| 19. Blouse/Shirts | 22.8 |
| 20. Macaroni/Spaghetti | 20.3 |

*Source: JETRO, 1986*

Manufactured Imports Promotion Organization survey conducted in January 1986 spells good news for American firms selling in Japan. "Made in Japan" may appeal to American buyers, but only about 20 percent of Japanese consumers surveyed favored domestic goods and only 3 percent bought no imports at all.

The survey, which polled over 1,500 consumers aged 18 or older living in five metropolitan areas, found that food imports--present in 91 percent of households polled--topped all others in market penetration. Clothing imports came in second (71 percent of households), followed by leisure-time and recreation products (60 percent of households). On the other end, even though 35 percent of single men and 18 percent of men polled wanted to buy an imported car, only 5 percent of respondents owned an imported car. Price was the biggest deterrent, followed by the availability of satisfactory domestic cars.

Four of the top five import items are luxury items often given as gifts such as whiskey and brandy, tea, perfume, and chocolates. About 30 percent of respondents gave imported goods as Christmas or year-end gifts.

Good design and high quality go a long way with Japanese consumers. Turn-offs in order of severity are inferior quality and performance, high prices, unavailability of spare parts, inadequate after-sales service, and high maintenance costs, according to the survey.

A 1986 survey conducted by Fuji Bank questioning 700 Tokyo housewives confirms these findings. Nearly 30 percent of the housewives polled believed that imports were shoddily made, and 25 percent felt foreign-made goods lacked clear instructions for use and were in many cases devoid of after-sales service. Thirty-five percent commented that imports once had a reputation of being good, but that they now believed Japanese products were superior. •

INSIDE INFORMATION

# Japanese youth like home and society

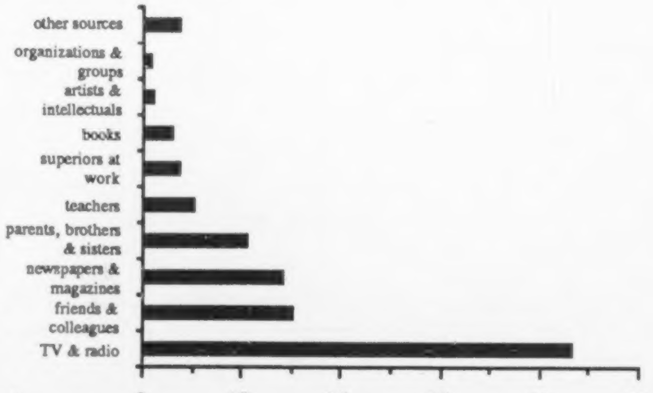
Today's young Japanese increasingly perplex and worry their elders. A 1985 survey of 15-to-23-year-olds found almost 70 percent wanting to live an individual and carefree lifestyle and fewer than 10 percent wishing to lead lives useful to society--almost exactly the reverse of a similar poll taken in 1960.

But the new-found, easy-going lifestyle of young Japanese so disturbing to their workaholic parents is lessening the worries of the young. The 1985 survey of some 3,000 young men and women aged 15 to 23 found increasing contentment with life and society in general. Of those polled, almost half (46 percent) said they had no worries and about 44 percent said they had few or no worries concerning home. This contrasts to the 1970 survey findings in which only 16 percent said they had no worries at all concerning home.

Satisfaction with society in general was also up. Whereas only 34 percent of survey respondents expressed such satisfaction in 1970, more than 50 percent of those in 1985 did. More women were satisfied with their lot in 1985 than men--48 percent of men and 40 percent of women expressed dissatisfaction. Trends by age show that few teenage girls were dissatisfied (about 37 percent), but that many men in their 20s (about 58 percent) were dissatisfied. Dissatisfaction stemmed from "people can't do what they think is right" (46.3 percent), "the deserving aren't rewarded" (32.3 percent), and "society is inflexible" (29.8 percent).

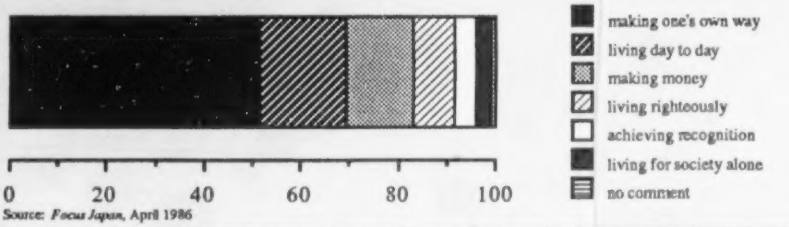
Another poll of this same age group conducted by the Management

**Influences on Japanese youth** *(in percent)*



Source: *Focus Japan*, April 1986

**Lifestyle preferences of Japanese youth** *(in percent)*



Source: *Focus Japan*, April 1986

and Coordination Agency found the influence of newspaper and magazine articles and books on the decline with youth and that of TV and radio on the upswing. Over 43 percent of youths surveyed chose TV and radio as the greatest influence on their thinking. The opinion of others, especially friends and colleagues (15.1 percent) and family members (10.4 percent), came in second to Japan's pervasive media. Teachers (5.1) percent and superiors at work (3.7 percent) held little sway with Japan's markedly less submissive young. •

# PUBLICATIONS

**International Benefit Guidelines**, 1986. New York: William M. Mercer-Meidinger, International, 1986, 217 pp., free. Order from Lidia Stephan, William M. Mercer-Meidinger, International, 1211 Avenue of the Americas, New York, NY 10036.

U.S. companies that hire native personnel in foreign countries need to know the latest rules and regulations on required benefits in those countries. This free volume from William M. Mercer International provides a brief look at the benefit policies of 58 countries.

For example, the section on Argentina alerts the reader to the fact that the government is studying a way to protect real wages against inflation and that inflation is projected to be 26.8 percent in 1986.

The reader also learns, among other things, that in disability cases, employers are required by law to maintain full income for three months if an employee has less than five years service, but for six months if the employee has more than five years service. If the employee has dependents, both periods are doubled.

Categories of benefits covered for most countries include salaries, retirement, death, sickness and disability, termination, medical, worker's compensation, and social security.

The country-by-country descriptions also serve as a guide for what will be expected for executive employees assigned to a foreign post. For example, in Brazil, profit-sharing plans and/or bonus plans are common for senior management, and employee loans at favorable interest rates are often offered.

**The World Bank Atlas,** 1986. Washington, DC: The World Bank, 1986, 28 pps., $5.00. Order Stock No. BK0684 (English edition) from The World Bank, Publications Dept., K910, 1818 H St., N.W. , Washington, DC 20433.

Nearly half of the world's people live in countries with a gross national product (GNP) per capita of $400 or less. In contrast, only about a sixth live in countries with a GNP per capita of more than $5,500.

While there has been some growth in the GNP per capita of most developing countries, more than 300 million people--mostly in Africa--live in countries where the per capita income has dropped in the past decade.

Other indicators included in the atlas show that more than 400 million people live in countries where the average life expectancy at birth is less than 50 years, than more than one-sixth of the world's people live in countries where one infant in 10 does not reach its first birthday, and that in most developing countries, girls are still less likely to attend school than boys, even though the number of children in elementary school has more than doubled since 1960.

This nineteenth annual edition of *The World Bank Atlas* includes data for 184 countries on population, gross national product, and GNP per capita. For each indicator, the atlas gives data for 1983, preliminary estimates for 1984, average annual real growth rates during 1974-83, and, for GNP per capita, the percentage change from 1983 to 1984.

**International Research Centers Directory** 1987-87, Third Edition, edited by Kay Gill and Darren L. Smith. Detroit: Gale Research Co., 1986, 1,110 pps., $310.00. Order from Gale Research Co., Book Tower, Detroit, MI 48226.

Among the 4,200 descriptions of research facilities in about 130 countries are 20 listings for demographic research, 9 for marketing, and 1 for advertising, and others of interest to researchers under such headings as economics and employment. This directory is a convenient guide to worldwide government, university, independent nonprofit, and commercial research and development activities.

Entries are arranged by country and indexed according to country, subject, facility and keyword. There are up to 16 categories of information about each research unit, including name in English and in native language, address, telephone number, organization head, principal research activities and fields, and publications and information services.

The directory tells you, for example, that West Germany has three marketing research centers: The Institute for Consumer and Behavioral Research, Nurenberg Association for Consumer, Market, and Sales Research, and Research

Unit for General Economics and Textile Marketing.

This is a useful directory for those seeking noncommercial sources for marketing research.

FEATURE

# Service businesses boom across borders

Getting away from it all is harder than ever before. Just turn on your television in a small Mediterranean town. Local color turns out to be a Hollywood rerun. Or sup in a remote Andean town where the waiter asks what major credit card you'll be using.

Encountering familiar services in faraway places is becoming all too familiar. The internationalization of services just won't go away. Every day, more than $2 billion worth of services are delivered to foreign markets, either through exports or foreign affiliates. Normally invisible, intangible, and instantaneous, services in world trade range from banking, insurance and shipping, to travel, data processing and entertainment.

While the bulk of international business in services is between industrial countries, an increasing proportion is sold to Third World nations, which were already running a combined services trade deficit of $37 billion a year in 1980. The transnational services boom is not surprisingly under scrutiny in many capitals. Exporters of services--principally the U.S., Canada, Japan, and Europe--are interested in keeping overseas markets open to encourage the expanding multi-billion dollar trade. Developing and newly industrialized countries are wary. They are worried that a flood of foreign services will stifle their own infant service industries and dominate economically strategic sectors such as banking and insurance. There is also concern that services from abroad will sap local cultures, with the Canadian effort to protect its film, television, and print media being a notable reaction.

There's nothing new about the export of services. What is new is its unprecedented growth. A number of factors fuel the dramatic upsurge. For one, services are more important than ever before within industrial countries, accounting for up to 70 percent of all economic activity and as much as eight out of ten new jobs. Technological innovation has also played a part, both by creating new services and making traditional ones more tradable. An architect in London, for example, can send blueprints anywhere in the world with a facsimile machine and telephone services.

*continued*

PUBLICATIONS

# Central American consumer information

Gathering data on consumers in developing countries is not easy. Fortunately, when *Euromonitor* sees a gap in market information, it fills it. There are seven new volumes that focus on marketing opportunities in developing countries. They include The Middle East, Central America, The Indian Subcontinent, The Far East, West Africa, North Africa, and Latin America.

The typical volume includes a brief look at population data; trends in industrial output; production of consumer goods (by type); data on investment, imports and exports, marketing, advertising, retail distribution, housing and households, and consumer expenditure in such areas as textiles, tobacco, drinks, cars, electrical goods, and services.

On the Panamanian market, for example, one learns that the import market for cosmetics almost doubled between 1975 and 1983 and that the United States supplies most of the imports of soap, colognes, and shampoos. In 1982, the last year for which data are available, Panamanians purchased $760 million in imported goods, more than a quarter of which was spent on semi-durable goods. Processed foods and drinks and other consumables each took 19 percent of the imported goods dollar. Fifteen percent went for durable goods and 14 percent for passenger cars.

Among Central Americans, Panamanians consume the most beverages and fresh meat per capita.

Japanese electrical goods have penetrated the Panamanian market where most electrical goods are imported rather than produced domestically. Panamanian households are the most likely of any in their region to own these goods. Nearly 72 percent of households owned a television in 1980, the last year for which data are given. A radio was owned by 73 percent. Three-quarters of households owned a refrigerator, 55 percent a washing machine, and 27 percent a sewing machine.

Depending on the number of countries covered, volumes range in size from 175 to more than 400 pages. Each volume is $195 and can be ordered from Gale Research Company, Book Tower, Detroit, MI. 48226.

Moreover, new technology has meant that many services can be delivered to foreign markets for the first time through trade. According to Karl P. Sauvant, at the United Nations Center on Transnational Corporations, no framework exists for such trade. "For trade in goods, you have GATT. For trade in services, there are no rules of the road. In many cases, we simply don't even have statistics on service flows," says Sauvant. The difficulty in measuring "invisibles" means that the international services sector is undoubtedly much larger than official statistics show.

Delivering services to foreign markets often requires setting up foreign affiliates. To export a car, you need only ship it overseas. "With a service, there is a much greater requirement to set up a local facility to 'unlock' the service," says Sauvant. Studies show that sales of services through foreign affiliates are perhaps four or five times higher than exports of services, at least for the developed nations.

Today the services sector is the largest employer in both developed and developing countries. According to OECD statistics, trade in global services doubled between 1960 and 1970 and again between 1970 and 1975. During the decade 1971 to 1980, trade in services grew from $85 billion to over $350 billion. By comparison, merchandise trade in 1980 had a value of $1,650 billion.

Compared to the trade of developed countries in services, the developing countries are still at a distinct disadvantage. The share of developing countries in world service exports was only 18.2 percent in 1980, although they had a 28.6 percent share of merchandise exports in the same year. Whereas the balance of service trade for developed countries increased from a $3.7 billion surplus in 1970 to a record $30.6 billion surplus in 1980, the service account deficit for developing countries increased from $11 billion in 1970 to $82.5 billion in 1980.

The U.S. leads in the export of services, garnering $34.7 billion in 1985. The U.K. follows, with $34.4 billion; France, $33 billion; West Germany, $32.3 billion; Japan, $18.9 billion; and Canada, $7 billion. Other developed market economy countries together earned $131 billion, while developing countries received $66 billion.

With services firmly established as the engine of economic growth in the last decades of this century, they are inevitably becoming an increasingly controversial factor in the world of international trade and investment. •

*--Stephen Whitehouse*

## CONFERENCES

**"Anticipation and Decision Making: The Need for Information,"** will be the theme of the 39th annual congress of the European Society for Opinion and Marketing Research scheduled for September 14-18 in Monte Carlo. Program highlights include a presentation on "The Shaping of the European Identity," and speakers on "New, new product development, " advertising and communications, and anticipating and solving problems in qualitative research. Subject sessions include international/multi-country research, travel and tourism, finance, East/West cooperation, and marketing management information systems.

For more information contact Central Secretariat, J. J. Viottastraat 29, 1017 JP Amsterdam ,The Netherlands . Telephone (020) 64.21.41. Telex: 18535 esmar nl.

Advance information is available from the same organization about two seminars: "Opinion Polls" will be held Nov. 26-28 in Strasbourg, France, and "The Application of Research to Broadcasting Decisions" will be held January 28-30 in Amsterdam.

**The First European Congress on Continuing Education and Training** will be held Oct. 9 and 10 in West Berlin. Further information is available from Spectrum Communications, Xantener Strasse 22, D-1000 Berlin 15, FRG. •

## COMING UP

**Belgium:** A heavily industrialized country at the hub of Europe

**Canada's smokers:** A report on preliminary data from Canada's General Social Survey

**Out to Play:** Popular Japanese pastimes

**Desktop Demographics:** Microcomputer software with international demographic/ marketing applications

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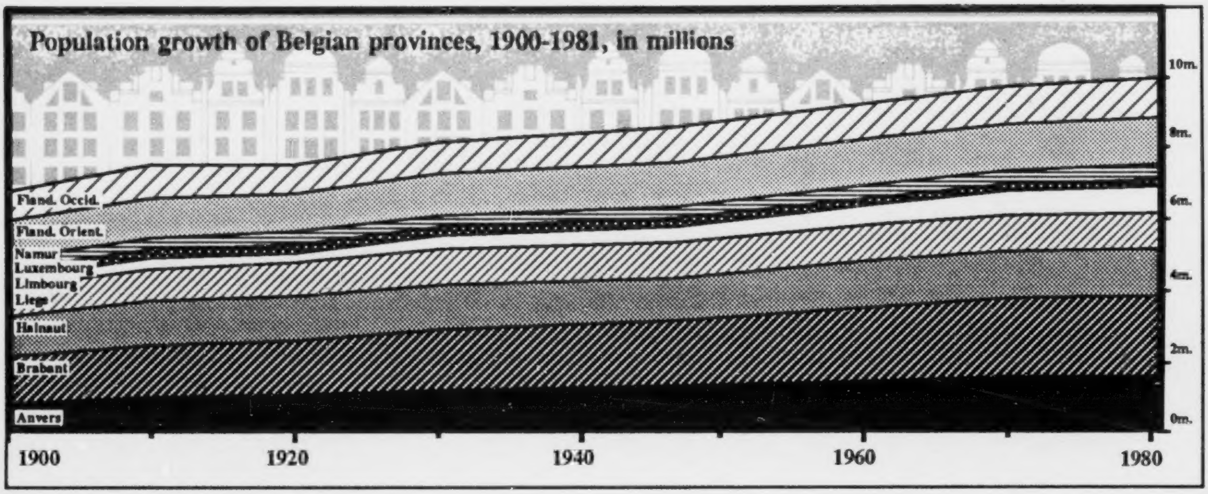
# International Demographics

CONSUMER TRENDS AND MARKETS ABROAD
SEPTEMBER 1986 VOLUME 5, NUMBER 9



Population growth of Belgian provinces, 1900-1981, in millions

COUNTRY PROFILE

# The Kingdom of Belgium

*Your Grace, there are no Belgians. There are only Walloons and Flemings.*

Prominent politician and writer Jules Destree's pronouncement to his popular king, Albert I, around the turn of the century still rings true.

Clashes have grown less violent in recent years, but nagging rivalries persist between Flemish-speaking and economically better-off Flanders in the north, with its larger share of the nation's nearly 10 million residents, and industrially ravaged, French-speaking Wallonia in the south.

Squabbling political factions within each of these two officially drawn regions heat up the national debate, and--something absent in Destree's day when French alone was the recognized language of Brussels--Flemings and Walloons are constantly at odds over representation in the government of the now bilingual capital region, itself a third lawfully designated region.

Still another voice, this time in German, figures to a lesser extent in the country's confrontational politics. In the absence of national political parties, there are dozens of local blocs with widely differing views, a condition that contributed in no small way to the fall of 37 governments since the end of World War II alone. (In the opening stages of last year's election, more than 3,500 candidates contested 318 parliamentary seats.)

People on the eastern reaches of Wallonia speak as their first language neither French nor Flemish (which is nothing more than Dutch with a Belgian accent and some added vocabulary). Too small in number to significantly alter political outcome, these German speakers have given the country a third official language.

*continued*

## INSIDE

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THIS MONTH: BELGIUM

However precariously, the Kingdom of Belgium has learned to accommodate the internecine strife it has known for most of its relatively short existence. During long spells, she has gone well beyond concern with internal problems as a forerunner of the Industrial Revolution and as a magnet attracting foreign investment. Brussels has long been the West European base for many British and American companies.

Younger than the U.S., Belgium as we know it today was created in 1830 as a constitutional monarchy and buffer state amidst great European powers. Its constitution creating a parliamentary system of government has since served as a model for many emerging democracies. Over the centuries before independence, this flat land with ocean access along major trading routes in the heart of Old Europe belonged to France, Spain, Holland, and others. Each left traces of its culture in Belgian architecture, folk traditions, cuisine, art, and commerce. An outside presence is still very much in evidence. Brussels, as the administrative seat of the European Economic Community (EEC), draws thousands of temporary resident functionaries. Belgium also houses a number of other pan-European and international organizations, including Euratom, the atomic-energy coordinating agency, and is headquarters for the North Atlantic Treaty Organization.

COMPARATIVELY SPEAKING

Illustration by Diana Souza

*Like its European Community counterparts, Belgium can expect a substantial increase in the proportion of elderly people in the population--from 19.6 percent in 1985 to 23.8 in the year 2000.*

COMPARATIVELY SPEAKING

### VOTE FOR STABILITY

Belgium set aside, at least for the near future, its endemic destabilizing sectionalism. One indicator was the outcome of last October's national election. The vote--mandatory in Belgium--returned to office the center-right coalition which had held power since 1981, despite its program of tough public-spending cuts which helped halve inflation to 5 percent going into the election.

The beleaguered government of Prime Minister Wilfrid Martens--the sixth he's headed over the last eight years--seems determined to step up its austerity program regardless of a series of lengthy protest strikes last spring which severely paralyzed international rail traffic and many internal public services. Unemployment is edging downward from more than 14 percent in 1984, to just over 12 percent the first quarter of 1986.

Among other positive indications that austerity is paying off for the world's biggest per capita importer/exporter is a somewhat improved balance of payments and respectable overall economic growth of around 2.5 percent through the first half of this year, underpinned by close trading links and minimum customs formalities with neighboring Luxembourg and Holland.

Wages, however, lag behind inflation after the last government suspended an index system that mandated automatic income adjustments in line with the cost of living. In 1983, for the first time since the country's economic boom of the 1960s, purchasing power for the average Belgian declined.

### CITIES AND REGIONS

About 90 percent of Belgium's estimated 9,880,000 inhabitants live in cities and towns ranging over a territory of only 30,518 square kilometers (11,750 square miles)--roughly the size of the state of Maryland. This small nation of urban dwellers has one of the highest population densities in the developed world--323 persons per square kilometer.

Administratively, the region of Flanders has five provinces; Wallonia, four. Regions are further broken down into arrondissements and communes. Flanders, with 44 percent of the country's land mass and 57 percent of its population, has 24 arrondissements, including the Brussels region; Wallonia, with 55 percent of the territory and 33 percent of the population, has 20. The northern region has 308 communes compared with 262 in the south. The German-speaking eastern part of Wallonia encompasses only 854 square kilometers (330 square miles) and is home to 57,000 Belgian nationals and 10,000 persons of other

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origin.

One out of ten Belgians lives in the Brussels metropolitan region. The population of the region's 19 communes (including the city center) run from 105,000 in the Schaerbeek commune to 16,000 in that of Koekelberg.

In addition to the capital-city region, Belgium classifies 140 other concentrations as "cities." Of these, three had populations above 200,000 in 1981: Ghent in West Flanders (239,256); Charleroi in Hainaut (222,343); and Liege (214,119). Three had populations above 100,000 in 1981: Antwerp (185,897) and Namur (102,321), each in provinces with corresponding names; and Bruges (118,020), the lovely medieval art center, also in West Flanders, called the "Venice of the North" because of its many canals.

The strength of Wallonia's coal mining and steelmaking for more than a century enabled the southern region to dominate Belgium's economic and political life. But a relatively rapid shift to other forms of energy, cheaper iron and steel imports from Japan and elsewhere, and a drawback in government subsidies have idled this sector, causing high unemployment in areas like Charleroi, the country's second most populous city. Today, commercial clout and political leverage have moved north to Flanders, where high-tech and other nontraditional industry has taken root.

In addition, the Port of Antwerp--one of the world's busiest, handling about 80 million tons a year--lies to the north. Antwerp itself has long been one of the world's leading trading centers for diamonds and semiprecious stones. With an estimated half of the yearly trade passing through the city, it contributes about 6 percent to Belgium's annual GNP of $4.5 billion francs.

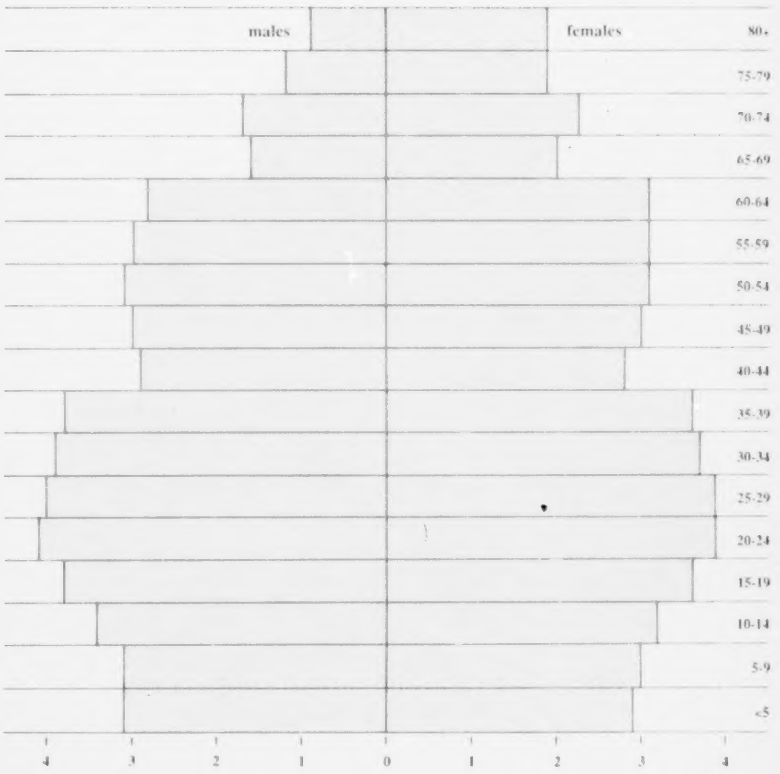
## POPULATION CHANGE

Whatever its peculiarities of language, culture, and politics, Belgium shares many of the demographic trends of its Western European neighbors. Its under-replacement-level birthrate is expected to decline further (except among a large, mostly non-native working-class population), and its proportion of elderly people in the total population is expected to rise, straining even further an already overburdened system of social security and health care.

Belgium's 10-year intercensal population gain (between 1971 and 1981) was the smallest in the country's history. By early 1984, the Belgian population declined for the first time since World War II. Belgium's total population on January 1, 1984 stood at 9,853,023, a decline of almost exactly 5,000 from the preceding year, according to

**Population of Belgium, by age and sex, 1985**

*(in percent)*



| *Age Group* | *Both Sexes* (in thousands) | *Males* | *Females* |
|---|---|---|---|
| 0-4 | 589 | 302 | 287 |
| 5-9 | 595 | 303 | 292 |
| 10-14 | 659 | 338 | 320 |
| 15-19 | 729 | 372 | 357 |
| 20-24 | 795 | 405 | 390 |
| 25-29 | 778 | 397 | 381 |
| 30-34 | 748 | 382 | 366 |
| 35-39 | 726 | 373 | 353 |
| 40-44 | 566 | 288 | 279 |
| 45-49 | 585 | 292 | 292 |
| 50-54 | 613 | 302 | 311 |
| 55-59 | 601 | 292 | 310 |
| 60-64 | 576 | 272 | 304 |
| 65-69 | 352 | 159 | 193 |
| 70-74 | 389 | 164 | 225 |
| 75-79 | 299 | 115 | 1846 |
| 80+ | 278 | 91 | 1864 |
| All ages | 9,880,000 | 4,848 | 5,032 |

the country's Institut National de Statistique. INS projections peg Belgium's population falling further to 9.8 million in 1985, 9.6 million by the year 2000, and 8.8 million in 2025.

The loss of inner-city residents to outlying areas recorded in the 1971 census, however, slowed, echoing similar trends in large urban concentrations elsewhere in Europe.

COMPARATIVELY SPEAKING

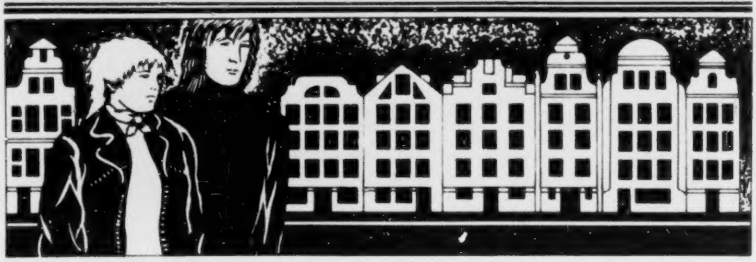


Illustration by Diane Souza

***Belgium's 1985 unemployment rate of 13.2 percent was one of the highest among EEC countries.***

COMPARATIVELY SPEAKING

Nearly 891,000 non-natives lived in Belgium in 1984. Their distribution is very irregular but a fair number, especially among the 60 percent from within the EEC, have gravitated toward Wallonia's hard-pressed industrial belt reaching from Moas to Liege. Non-natives from outside the EEC are concentrated in three principal areas: northwestern Antwerp Province, along a broad corridor dividing Limbourg Province, and in the Brussels region where non-natives now account for 25 percent of the region's population. This proportion is expected to reach 32 percent by 2000. Dutch dominate the non-native population (529,000), followed by Italians (280,000) and French (103,500). Other well-represented groups include Turks, Yugoslavs, and Kampuchians.

Antwerp and Limbourg Provinces are home to high proportions of young adults aged 19 to 29 (about 17 percent of the total population), and to a lesser extent, those 18 and younger. Overall, the proportion of youth in the Belgian population is declining. Those aged 5 to 15 fell from 664,900 in 1980 to 640,000 in 1982. Belgium's 30-to-59-year-olds predominate in the country's heartland--in Brabant encircling Brussels and spreading east from there. *Le troisieme age*, those 60 and older, account for an important part of the population in rural areas such as the southern part of East Flanders. Between 1980 and 1982, the number of 65-to-75-year-olds fell, but the number of 75-to-85-year-olds grew by about 11,000 to an estimated 315,600.

Flanders experienced a 4 percent population growth between 1971 and 1981. Wallonia matched the small national increase of 2 percent. The Brussels region lost 8 percent of its population, a first-ever decline which stabilized in 1985. By 1984, Flanders had about 5.7 million residents and Wallonia about 3.3 million. The population of the Brussels region in the same year declined by 7,000 to 983,000.

Significant growth was noted in the suburbs of large- and medium-sized cities, in the rural northeast, and in portions of central Flanders with traditionally high birthrates. Most of the population loss was recorded in the centers of these same cities and in isolated rural zones.

Births in Belgium slid from 141,000 in 1970 to 120,000 by 1982. Belgium's birthrate fell from 12.6 per 1,000 in 1981 to an estimated 11.7 per 1,000 in 1986.

## HOUSEHOLDS AND FAMILIES

As elsewhere in Western Europe, Belgium's average household size is decreasing due to a larger aged population, an upsurge in divorces and unmarried young couples, and a declining birthrate. The largest households are found in areas of the country where the birthrate traditionally runs high. These include northeast and central Flanders, the core of the Ardennes, and the southern part of German-speaking Wallonia. In addition, higher-than-average sizes were recorded for households in suburban communes surrounding Ghent and Antwerp, southern Louvain and northern Namur, where the proportion of young married couples is high.

Although the Brussels suburbs have larger household sizes than the capital city itself, the trend toward smaller households is firmly established in this area as far south as Lasne in the part of Brabant in Wallonia and to the northeast and southwest of this province in Flanders, where size again increases. Antwerp leads Brussels on the list of cities with diminishing household size. Ghent and Liege come next, followed by Louvain, Malines, Huy, Charleroi, Mons, and Bruges.

Singles accounted for 25 percent of the Belgian population in 1981 (up 6 percent from 1971) with a growing number of young men and women living together in *union libre*. Such an arrangement, however, clashes with the conventional mores of the large Belgian middle class. A longstanding Belgian tradition, usually reserved for the upper classes in other societies, of "eligible" daughters attending a string of debutant balls, for example, continues.

In some cities, such as the Ixelles Commune of Brussels, single residents account for as much as half of the population.

## LABOR FORCE

The size of Belgium's active labor force reflects in part a continued high unemployment rate and a growing post-retirement population. About a third of the population is at work. At mid-1984 the figure stood at 3,638,000, an increase of 5,000 over the same time the previous year. By the end of 1984, 14 percent of the labor force was unemployed, a figure which declined to 12.7 percent at the end of 1985 when 542,400 were seeking work and nearly 20,000 jobs went unfilled. More than 25 percent of the unemployed were under 25.

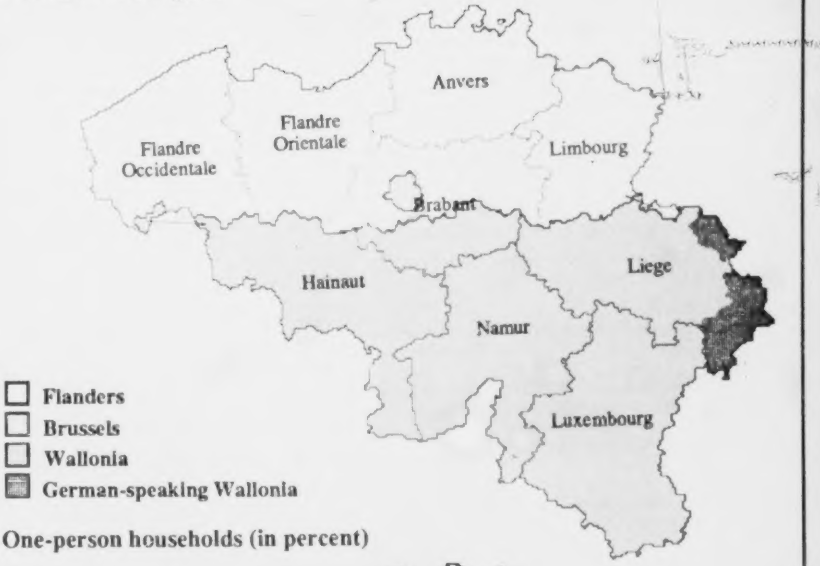
Of those at work, 2.4 percent earn top incomes, according to the Centre d'Information sur les Media in Brussels. Middle-management personnel and small businessmen account for about 23 percent of the working population; white-collar and skilled workers, 57 percent; and low-income, unskilled laborers, and those collecting pensions, 18 percent; according to CIM.

The services sector generates more than half the country's jobs. In 1984, about 2.4 million Belgians were employed in the service sector--about the same number as in 1983. Industry provided work for over 1.1 million Belgians in 1984, down from 1.5 million in 1970 when services engaged just under 2 million workers. Agriculture provided work for 174,000 Belgians 15 years ago. Today, with an eroding farm base (3.4 million acres in 1985), that figure has fallen by at least 68,000.

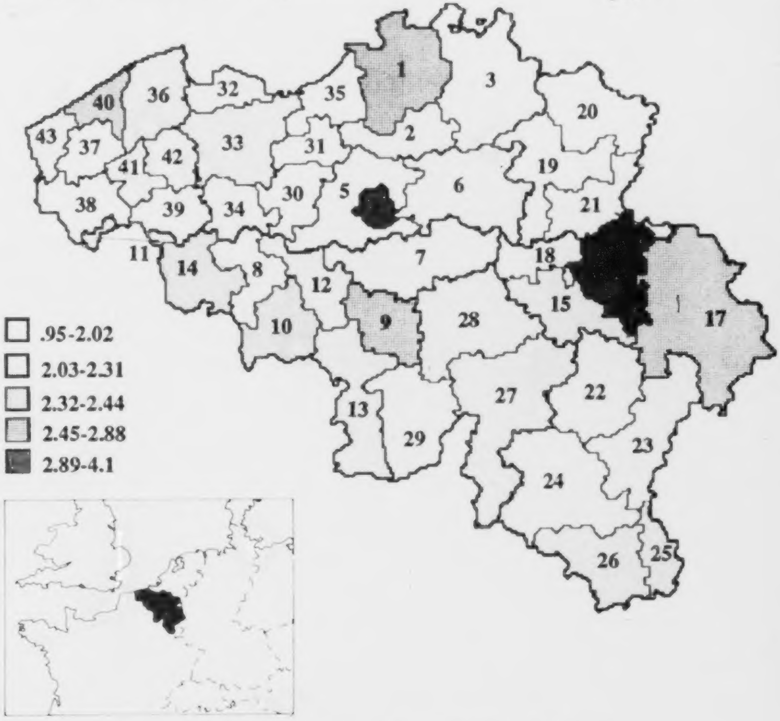
In 1984, an industrial worker could expect to earn an average of about $1,400 a month. About 50,000 white-collar workers earned an average of about $750 a month; 96,000, about $1,000; and 70,000, about $1,500. However, once deductions are made for Belgium's costly social security and high taxes, net income on a weekly paycheck of about $235 is about $137. This gap is expected to widen due to government policy eliminating tax breaks for married couples in a series of fiscal measures designed to reduce a staggering national debt by 3 percent. Belgium's debt is running at 11 percent of the GNP this year.

Consumers are also being asked to pay more in value-added tax. Belgium's VAT had been in the mid-range of those of the EEC countries, but it is being raised on many goods

**Provinces and regions**



**One-person households (in percent)**



**Population gains and losses in arrondissements (1970-1981)**

1. Anvers (+)
2. Malines (+)
3. Turnhout (+)
4. Bruxelles--Capitale (-)
5. Hal-Vilvorde (+)
6. Louvain (+)
7. Nivelles (+)
8. Aih (-)
9. Charleroi (-)
10. Mons (-)
11. Mouscron (+)
12. Soignies (-)
13. Thuin (-)
14. Tournai (-)
15. Huy (-)
16. Liege (-)
17. Verviers (-)
18. Waremme (-)
19. Hasselt (+)
20. Maaseik (+)
21. Tongres (+)
22. Marche-en-Famenne (-)
23. Bastogne (+)
24. Neufchateau (+)
25. Arlon (+)
26. Virton (+)
27. Dinant (-)
28. Namur (+)
29. Philippeville (+)
30. Alost (+)
31. Termonde (+)
32. Eeklo (+)
33. Gand (+)
34. Audenarde (+)
35. Saint-Nicolas (+)
36. Bruges (+)
37. Dixmude (+)
38. Ypres (+)
39. Courtral (+)
40. Ostende (+)
41. Roulers (+)
42. Tielt (+)
43. Furnes (+)

INSIDE INFORMATION

## Small, beautiful, and beastly

### Belgium's bilingual advertising scene

**For many pan-European advertisers, small is beautiful. Brussels, with its considerable international population, is an ideal test market for new products and services.**

**But Belgium's relatively small market of under 10 million inhabitants can be a double-edged sword for advertisers. Small readerships and viewing and listening audiences hold down the cost-per-thousand rate on which advertising is based. However, the costs of duplicating advertising in at least Belgium's two main languages of French and Flemish in such a small market adds to costs, according to Stef Eyckmans, general manager for KRP S.A., the Belgian branch of a New-York based ad agency specializing in medical marketing.**

**Eyckmans offers these tips for advertising to Belgians:**

- ***The language problem for advertisers in Belgium exists at two levels.* First, the problem is more than just language; it is also cultural. The Flemish (Dutch-speakers) and the Walloons (French-speakers) consider themselves two different peoples; consequently, their approach to things and their ways of looking at things must be taken into consideration in the very fabric of the advertising campaign.**

- ***Second, it is not acceptable to simply translate from French into Dutch, or Dutch into French, or from English into both.* Advertising copy must "sing" to be effective. Something that obviously looks like a translation is not only less effective, it may actually cause cultural resentment from the one group or the other. It is therefore imperative when advertising to the general public (less so when addressing professional groups) to use competent copywriters (not translators) in the two languages; copy should appear to have originated in both French and Dutch, even if it didn't. And of course you must typeset, proofread, and print in the two different languages, which inevitably increases the costs of a campaign compared to a unilingual market.**

- ***The difficulties are magnified in Brussels, especially with regard to direct-mail advertising.* Whereas there are distinct French and Flemish regions, Brussels is officially bilingual. To avoid infringing both the law and sensibilities, direct-mail materials should be sent in both languages to most target groups.**

- ***Finally, it is useful to bear in mind that Belgium is a small market of under 10 million.* Because of the added costs of concepts, copy, and production, advertising agencies often cannot live off media commissions alone, except for the most broadly advertised mass merchandise products. For specialty products, be prepared to pay an agency fee in addition to the traditional media commissions.**

**The problems of advertising in Belgium are formidable, but not insurmountable. The secret is to recognize that they exist and give adequate time (the number 1 consideration) and budget (number 2) to overcome them.**

*--Peter Inserra*

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and services to the prevalent rate in France of 33 percent. Measures such as this are increasingly forcing Belgians to tap into their savings. Unemployment benefits are also being reduced and, in contrast to the general trend elsewhere, the official retirement age for women has been raised from 60 to 65.

#### CONSUMPTION

Unlike the svelte French, or even the Dutch, Belgians eat heartily. Their consumption of French fries is a conspicuous national pastime--and the basis of many usually good-natured jokes the French tell about *les belges*. Stands and vans across the countryside do a brisk business dispensing *cornets*, paper cones of French fries dripping with mustard, tartar, or any of a dozen or so other sauces. The revered *frites* can even be obtained in hot portions from an automatic dispensing machine.

To wash down their French fries and mussels Belgians have another mania--beer. Breweries are steadily expanding to meet per capita consumption of 122 liters (107 quarts). Dozens of home-brewed brands like Morte Subite (literally "sudden death") compete for the local and export markets, and a fair number of beers are imported.

No wonder then that Belgians spend more on food than on any other household expenditure item. The largest share of household consumption in 1983 was on food, at 18.6 percent; expenditures on gross rent, fuel, and power followed at 17.7 percent; transport and communication, 12.7 percent; furniture, furnishings, and household equipment, 12.2 percent; medical care and health expenses, 9.2 percent; recreation, entertainment, education, and cultural services, 9.2 percent; and footwear and clothing, 7 percent.

#### COMMUNICATIONS AND TRANSPORT

An accommodating government policy on access to the airwaves and the world's largest cable network gives at least 70 percent of the 3.6 million Belgian households with TVs access to up to two dozen channels in six languages, including English.

Over 4 million households have radios. Two state-run TV outlets and two national radio channels broadcasting in French and Flemish prohibit brand advertising, a situation which could loosen up in the future when, it appears, Belgium will take the lead in permitting comparative advertising. French commercials are aired over Radio Television Luxembourg (RTL) whose TV signal can be picked up by about 60 percent of the Belgian population and whose radio programs reach more than half of Belgium's residents. Over 150,000 video recorders are said to be in use. Belgium had 4.1 million phones in service at the end of 1983.

The publications sector is

surprisingly vital for a country of Belgium's size. Belgians can choose from 35 dailies and more than 160 weekly and other newspapers. Advertiser-oriented free sheets number about 450. Consumer magazines range over 110 titles. An astonishing 1,200 trade and technical magazines are available.

Of the $15 million spent annually on advertising in the Belgian media, standard newspapers, including financial dailies in French and Flemish, and consumer magazines each account for about 26 percent. The free sheets absorb 14 percent, other magazines about 5.5 percent, and TV a little over 10 percent (RTL and nonbrand commercials). Outdoor and transportation advertising combined take up 16 percent of all spending on advertising.

Belgium's roads are well developed, thanks in large measure to extensive post-World War II expressway construction. In 1982, expressways ran nearly 1,400 kilometers, accounting for about one-tenth of the total road system. More than 3.3 million private cars were in operation in 1984, but new car registrations the previous year dropped about 6,000 compared with 1982, establishing a nine-year low.

The nationalized rail network is one of Western Europe's most extensive despite a drop in total kilometers from 5,127 in 1938 to 3,842 in 1983, when it still employed more than 63,000 persons. Belgium is an important hub for international rail travel linking, for instance, Amsterdam with Paris via Antwerp, Brussels, and Mons.

Trolley cars clank and sway their way around and under the country's principal urban centers like Antwerp and Brussels, which also have rapid-transit rail and bus suburban commuter links and relatively new subways.

## SOURCES OF INFORMATION

Belgium's Institut National de Statistique, rue de Louvain, 44, B-1000 Brussels, to date has published several volumes analyzing in French and Flemish the results of the last census. Among them:

*Atlas Statistique du Recensement de la Population et des Logements 1981 Partie 1: Donnees demographiques* (Statistical Atlas of the 1981 Census of Population and Housing. Part 1: Demographics): This document summarizes the general population, its composition by age and nationality, and its evolution of households by size and married occupants. The volume comes with four transparent overlays of arrondissements, cities, provinces, and regions for use in conjunction with numerous computer-designed maps of the country which graphically depict the accompanying text. A large number of pyramids concerned with various population aspects completes this 122-page volume. It costs 250 Belgian francs (BF), or about $5.50.

*Tome 1--Chiffres de la Population* (Volume 1--Population Figures) goes into great detail on the population down to the commune level and highlights statistics of each census since the first in 1846. Among illustrations are maps in two colors showing population migration within the country since 1900 and its evolution from 1970 to 1981. It costs 420 BF, or about $9.30.

**Where they live** Belgium's inhabitants, 1981

| *Regions* | *Population* | *Percentage of total population* | *Provinces* | *Population* | *Percentage of total population* |
|---|---|---|---|---|---|
| Brussels | 997,293 | 10.1 | Anvers | 1,569,876 | 15.9 |
| Flanders | 5,630,129 | 57.2 | Brabant | 2,221,222 | 22.5 |
| Wallonia | 3,221,225 | 32.7 | Hainaut | 1,301,477 | 13.2 |
| German-speaking Wallonia | 64,914 | 0.7 | Liege | 999,413 | 10.1 |
| Total | 9,848,647 | 100.00 | Limbourg | 716,888 | 7.2 |
| | | | Luxembourg | 221,926 | 2.2 |
| | | | Namur | 407,400 | 4.1 |
| | | | Flandre Orientale | 1,331,192 | 13.5 |
| | | | Flandre Occidentale | 1,079,253 | 10.9 |
| | | | Total | 9,848,647 | 100.0 |

**Big city lineup** How big Belgian cities fit in the national landscape

| *City Arrondissement Province* | *1981 Population Total* | *Percentage in arrondissement and province* | *Density per square kilometer* |
|---|---|---|---|
| Bruxelles | 997,293 | | 6,164 |
| Brabant Province | 2,221,222 | 45 | 661 |
| Anvers | 501,261 | | 2,364 |
| Arr. of Anvers | 918,146 | 55 | 917 |
| Anvers Province | 1,569,876 | 32 | 547 |
| Gand | 239,256 | | 1,530 |
| Arr. of Gand | 485,565 | 49 | 514 |
| Flandre Orientale Province | 1,331,192 | 18 | 446 |
| Charleroi | 222,343 | | 2,172 |
| Arr. of Charleroi | 443,832 | 50 | 799 |
| Hainaut Province | 301,477 | 17 | 343 |
| Liege | 214,119 | | 3,079 |
| Arr. of Liege | 605,123 | 35 | 759 |
| Liege Province | 999,413 | 21 | 258 |
| Bruges | 118,020 | | 921 |
| Arr. of Bruges | 254,221 | 46 | 390 |
| Flandre Occidentale Province | 1,079,253 | 11 | 344 |
| Namur | 102,321 | | 583 |
| Arr. of Namur | 261,054 | 39 | 224 |
| Namur Province | 407,400 | 25 | 111 |
| Total population of cities | 2,394,613 | | |

## TIPS ON TRADE

### Japan's Famicon Fever

**Move over Hello Kitty. You too Ultraman. Famicon, Japan's new high-tech sensation, is now the most popular toy ever to be made in Asia's electronics wonderland.**

**With over 7 million of these TV game computers sold since 1983, Nintendo Company is racing to keep up with demand, while other manufacturers crowd the market with look-alikes trying to cash in on what's being called the "Famicon (family computer) phenomenon."**

**Famicon costs about $82. Software is sold separately in plug-in cartridges and magnetic disks. Nintendo's best-selling game, "Super Mario Brothers," netted the company about $68 million and spawned a best-selling book *How to Win at Super Mario Brothers*.**

**Why such a smash? Industry analysts in Japan feel that Famicon's appeal comes from users feeling in command while being challenged to perform. Users tend to be children between the ages of 7 and 15.**

**Nintendo intends to keep challenging its customers as they age. Its next step is to network its over 6 million users to a central computer over telephone lines for a full range of new media services.**

### Big Blue Beats Japanese Giants

**A survey of 1,500 Japanese companies found IBM's model 5550 favored over Fujitsu's 9495 series and NEC's 9800 series. Big Blue now holds a 24 percent share of the PC market in Japan.**

**The survey also found that experimentation with different brands of computers is waning in Japan. Of the companies surveyed, 71 percent were using only one type of computer, as compared with about 42 percent last year.** ***Source: JETRO***

*Resultats Generaux--Age, sexe, etat civil (marital status), nationalite et menages* (households) treats these categories from the national to commune level. It costs 200 BF, or about $4.50.

*Resultats Generaux--Logements*: The same approach as above for housing. It costs 300 BF, or about $6.60.

*Enquete sur les Budgets des Menages 1978-79*: Published in 1984, this study gives some insight into household budgeting for the country as a whole, and includes statistics by dwelling size and number of working heads of household. It costs 300 BF, or about $6.60.

*Perspectives de Population, 1981-2025* projects Belgium's declining population trend over the coming four decades according to age by regions, including that of Brussels. It costs 300 BF, or about $6.60.

INS also publishes an exhaustive statistical yearbook, *Annuaire statistique de la Belgique*, the most recent one being for 1984 at 900 BF, or about $19.80, and a 228-page paperback version, *Annuaire statistique de poche*, an excellent summary of vital statistics. It costs 160 BF, or about $3.50. An eight-page pocket-size statistical overview is free--as is the INS catalog giving prices for additional census documents and a wide range of other publications. Contact the Brussels office INS by phone at (02) 513 96 50.

The monthly *Bulletin of the Banque Nationale de Belgique* provides a well-documented running tabulation on the country's economy, including relevant demographic data. Of superb quality, it can be obtained by annual subscription (1,450 BF, or $32 by air; 650 BF, or about $15, by surface) or by the number (145 BF, or about $3; and 65 BF, or about $1.50). Write to the bank at boulevard de Berlaimont, 5, B-1000 Brussels.

An amply documented 75-page statistical study of the Brussels region is published by Agglomeration de Bruxelles, Service de Documentation, rue de la Loi, 15, Bte No. 101, B-1040. Write concerning current availability and cost.

"Europe's Population--Major Trends and Implications," issued by the Conference Board in Europe, is useful despite its 1980 publication date for the trends it spots in Belgium and the comparisons it makes with 15 other countries. Copies are available from the Board's New York City or Ottawa offices, or write the Brussels office at avenue Louise, 326, Bte 48, B-1050.

The French-language daily *Le Soir* published four articles during the summer of 1982 looking into initial results of the previous year's census. The series at 64 BF, or about $1.50, plus postage is available from the newspaper's back-number service at place de Louvain, 21, B-1000 Brussels.

The Belgian-American Chamber of Commerce, 50 Rockefeller Plaza, New York, NY 10020, in previous years has published a directory of more than 1,500 U.S. companies doing business in Belgium. Ask, too, about the monthly *Belgian-American Trade Review*.

In addition to the substantial business and general-interest press--in some cases publications offer separate editions in French and Flemish--the large English-speaking community supports *The Bulletin*, a general-interest weekly, and a newer sister monthly, *Prospects*, focusing on Belgian business. Annual introductory subscription for the former is 1800 BF, or about $40, and for the latter 800 BF, or about $18. Write to Ackroyd Publications, avenue Louise, 382, B-1050 Brussels.

The Comite Belge de la Distribution, rue Marianne, 34, B-1180 Brussels, can furnish specific trade information. An annual survey of Belgian media is compiled by the Centre d'Information sur les Media, Galerie Agora, bureau 110, rue Marche aux Herbes 105, bte 6, B-1000 Brussels. *--Peter Inserra*

DESKTOP DEMOGRAPHICS

# Demo-graphics

*This is the first in a series of reports that review and examine new personal computer products for displaying and analyzing international demographic data.*

Hit a few keys on your IBM PC or Apple and see Sweden's age structure in 1985. Hit a few more and see it in 2025, or compared to Brazil's age structure.

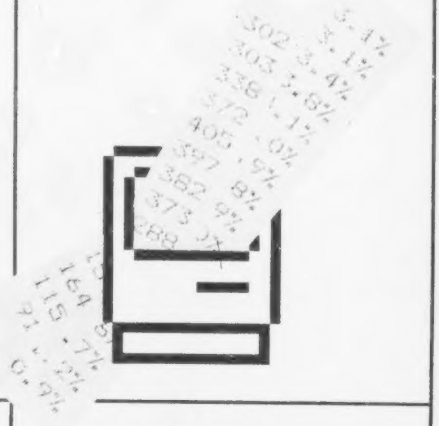
*Demo-graphics* is a program that projects population for 146 countries from 1975 to 2125. The software and data are on one floppy disk. The program is menu-driven and almost self-explanatory.

You can display population pyramids of one or two countries, rectilinear line graphs of various demographic indicators for one or two countries, and sequential line plots showing several projection series for one country.

*Demo-graphics* has built-in assumptions that produce the projections, but you can change them to see what alternative scenarios hold in store for different regions. You can change seven assumptions for any five-year period from 1975 to 2125--total population, age-specific fertility and mortality rates, age groups, total fertility rate, infant and child mortality rates, and life expectancy at birth. In most cases, you have to enter the data by sex.

The program has room for 78 extra "countries," which you can add yourself. These can be any geographic area, of course, such as states or cities. To create a new country, you have to enter the total male and female population, percent males and females in each five-year group, age-specific mortality rates for men and women, the sex ratio at birth, and age-specific fertility rates for women aged 15-44. If you don't have the data for a region, you can copy one that is similar to it and change the data according to what you do know. For example, you could assume that a state's fertility and mortality rates are the same as for the country as a whole and edit only the population and age distribution data that you can obtain.

*Demo-graphics* is published by COMPress, P.O. Box 102, Wentworth, NH 03282. It costs $95 and runs on an IBM PC or compatible with 128K RAM. An Apple version is available for $85 from CONDUIT, P.O. Box 388k, Iowa City, IA 52244. •



FEATURE

# Canadian smokers

One in three Canadians smokes daily and an additional 3 million non-smoking adults live with someone who smokes. That adds up to nearly half of the Canadian population breathing smokey air at home and work.

Canadian men are more likely than women to smoke at all ages, except for ages 15 to 24. Thirty percent of women aged 15 to 24 smoke daily, compared to 27 percent of men.

These findings are based on preliminary data from Statistics Canada's new annual General Social Survey. The first GSS, conducted in September 1985, collected data on adult health and social support for the elderly. About 11,000 people aged 15 and over from 11 provinces were interviewed.

Despite bad news on smoking adults, four out of five Canadians describe their health as "excellent" or "good." In addition, the same proportion of Canadians drink alcoholic beverages as in 1978. Sixty-three percent drink alcohol at least once a month, with men at all ages more likely to do so than women (74 percent versus 53 percent).

Elderly Canadians are a spry lot, according to survey findings. Only one in ten of the over 65 set said their health was "poor." About one in six provide such services as babysitting or transportation outside their own household. Of those over 55 who were not institutionalized, most were able to carry out daily activities such as light housework and grocery shopping. However, heavy housework and yard work were no-no's for 3 out of 10 in the over-55 set.

For more detailed information on the 1985 GSS, contact Janet Hagey (613-991-2572) or Gareth Jones (613-990-9293) at Statistics Canada's Housing, Family and Social Statistics Division. A detailed report on the first GSS is to be released in February 1987. A set of preliminary tables and a public-use microdata file are now available. •

# REGIONS

## EUROPE

### When down means up in Southern Europe

Keeping up with Northern European neighbors hasn't always been an uphill fight for Europe's southerners. Italy, Greece, Spain, and Portugal have maintained a continuous if not bumpy fall in their fertility rates from the 1930s onward, completing in the past 10 years the demographic transition Northwest Europe put aside 30 years before.

Italy's 1986 fertility rate--the average number of children a woman will bear in her childbearing years--is 1.5, equaling the average for all of Western Europe, and just below the average for all of Southern Europe of 1.8. Spain's fertility rate of 1.8 is slightly lower than Greece's at 1.9 and Portugal's at 2.0.

In the southern part of Europe, only Turkey, with its higher death rate and higher fertility, still hangs on to a large-family tradition. Turkey's 1986 fertility rate at 5.1 exceeds the average rate of 4.6 for Western Asia.

### West Germany

West Germany is the world's 13th most populous country with 60.7 million people. About 4.4 million of these people were resident aliens at the end of 1985, an increase of 1 percent over the previous year.

This increase interrupted a downward trend since 1982. Part of the increase was due to greater numbers of persons, especially Asians, seeking asylum--about 74,000 in 1985, nearly twice the 1984 total. The continued high birthrate among foreign residents relative to that of the native population was also cited as a cause by West Germany's Federal Bureau of Statistics.

In other news, the number of unemployed persons dropped below the 2.1 million level for the first time since June 1983. The jobless rate dropped from 8.7 percent in June 1985 to 8.5 percent in May 1986 and 8.4 percent in June 1986, according to the Federal Labor Agency. There were 43 percent more job openings this June than in June 1985. New jobs helped decrease unemployment among foreign residents by about 5,000 to 235,000, but teenage unemployment increased about 7,000 to almost 125,000.

### Proportion of French under 20 declines

The population of France increased by an estimated 218,000 people in 1985, reaching just over 55 million. This rise was accompanied by a decline in the percentage of the population under 20 and a gain in the share of those 65 and older.

According to the Institut National de la Statistique et des Etudes Economiques, those under 20 dropped from 29.1 percent of the total population in 1984 to 28.8 percent in 1985, while those in the 65 and over category rose from 12.8 percent to 13.1 percent during the same period. The overall population rise was a factor of an estimated 768,000 births and 550,000 deaths.

France continues to have fewer officially recorded marriages--273,000 during 1985 versus 281,000 the year previous and 300,000 in 1983. The country's fertility rate rose from 1.81 in 1984 to 1.82 in 1985. The estimated birthrate in 1984 of 13.9 per 1,000 (up 0.1 from 1983) was still below that in 1980 and 1981 of 14.9 and 14.6 in the census year of 1982.

A surprising finding was the slight increase in infant mortality in 1985, estimated at 8.3 per 1,000 births, compared to 8.2 per 1,000 in 1984. However, both these figures are significantly lower than the 10 per 1,000 recorded in 1980.

### Urban population loss slows in France

New data from France's Institut National de la Statistique et des Etudes Economiques reveal that large population movements away from major urban centers toward smaller cities and semi-rural areas have slowed significantly.

The Paris metropolitan area, for example, experienced a loss of 110,000 persons aged 14 and older in 1984 and added some 105,000. In contrast, during the period from 1975 to 1982, it lost an average of about 150,000 annually.

The story is similar in the economically hard-hit eastern part of the country. In the Franche-Comte and Lorraine areas, where a declining steel industry raised unemployment and prompted job seekers to look elsewhere, out-migration in 1984 amounted to only 15,000 people.

Arrivals in urban areas under 20,000 inhabitants taken together from outside departments (an administrative designation) tumbled during 1984 from 71,000 to 48,000. Semi-rural areas, on the other hand, are maintaining population gains.

The population outflows many cities in the West began undergoing in the 1970s are also lessening in countries other than France, including Belgium, Holland, and the U.S.

### Italy's submerged workers

Three and a half million Italians in 1983 with no official employment relationship reportedly have some kind of subsidiary occupation, according to Italy's Central Statistical Office. Although receiving money from the wage equalization fund, these submerged workers either do work at home, are not bound by contract, work second or third jobs, or engage in other kinds of work not recorded by the government in official records.

Workers whose work goes unreported to the government are concentrated in Lombardy (780,000), in Campania (426,000), and in Latium (400,000). The North accounts for 46 percent of the total.

## *NORTH AMERICA*

### More married Canadian women work

Married women in Canada are joining the labor force in ever increasing numbers. What's more, growth in labor force participation for women with children outpaces that for any other group.

Between 1977 and 1985, the number of married women in the labor force grew by 38 percent, although the total number of married Canadian women increased only by 11 percent. The number of women with children under the age of three--an estimated 315,000 of whom were in the labor force in 1977--grew to 520,000 in 1985. This 65 percent increase outstripped that for married women and the 7 percent increase for married men.

More information on the trend towards increasing participation of women in the labor force and its impact on the Canadian labor force can be obtained in *Family Characteristics and Labor Force Activity, Annual Average 1977-84* (71-533) for $33 from Statistics Canada, Publication Sales and Services, Ottawa, Ontario, Canada K1A OT6.

### Lone-parent families up

Canadian men and women are increasingly facing the reality of being lone parents. More men and women in 1985 were heading lone-parent families than ever before, with nearly equal rates of increase for both sexes.

Between 1977 and 1985, the number of single-parent families in Canada headed by women increased from 561,000 to 779,000, a 39 percent increase over the period. The men were not far behind. The number of men heading lone-parent families increased 32 percent from 158,000 to 209,000.

### Canadian wives and their work

If you're married, Canadian, and a woman, you've got a fifty-fifty chance of being employed; if employed, you've got a one in four chance that your job is part-time.

In 1985, the number of working wives nearly equaled the number who were unemployed--2,879,000 versus 2,954,000. An estimated 21 percent of working wives were part-time workers, compared to only 3 percent of husbands.

### Canada's metros thrive

Canada's census metropolitan areas (CMAs) are thriving. Almost all showed increases during the period June 1983 to May 1984.

Several CMAs showed high annual growth rates: Ashawa (3.2 percent); Saskatoon (2.3 percent); and Vancouver (2 percent). The overall population growth rate in 1983-84 for all CMAs equaled that for the total population of Canada of 1 percent.

As of June 1984, just over 56 percent of Canada's population (about 14 million) lived in CMAs. Toronto, Montreal, and Vancouver accounted for 52 percent of the total CMA population.

## *ASIA PACIFIC*

### Darwin and Canberra outpace other capital cities

Preliminary estimates of the capital city populations at June 1985 show that Darwin and Canberra have the highest current growth rates (3.6 percent and 3.4 percent, respectively). They are followed by Perth (1.8 percent), Hobart (1.4 percent), Sydney (1 percent), Brisbane (0.9 percent), Melbourne (0.9 percent), and Adelaide (0.7 percent). The population of Perth passed 1 million in 1985.

The estimated population of Australia in September 1985 was about 15.9 million, an increase of about 200,000 or 1.3 percent over the population count for the previous year. Of this growth, 63 percent came through natural increase (123,000), with overseas migration (72,000) contributing the remaining 37 percent.

Australia's population growth rate of 1.3 percent is higher than for the previous 12 months due mainly to increased gains from overseas migration, which rose from 47,000 in the year ended September 1984 to 72,000 in the same twelve months ending September 1985. •

## COMING UP

**Hot, new businesses in Japan**
**Montreal--French? English? Business must straddle the line**
**London boroughs--future winners and losers**

FEATURE

# Work hard, play hard--how the Japanese spend their leisure hours

Nowhere is work more sacrosanct than in Japan. Workers rarely take their full vacation days and Western-style, week or two long vacations are unheard of.

The average Japanese worker clocks in 454 more hours a year than a German , 429 more than a French worker, 285 more than an American, and 249 more than an Englishman. What's more, the Japanese worker only gets 10 paid vacation days in contrast to the 30 a German receives and the 20 an American enjoys.

Taking a long vacation a la the West is all but unthinkable. (The longest break a worker gets is the five-day New Years holiday.) No one wants to put down their burden for fellow workers to take up. Japanese workers take an average of 14 days off a year, using only 60 percent of their paid vacation days on average. Japanese workers only out-leisure their Western counterparts in the number of special holidays they receive, 18 a year as opposed to 9 in the U.S. and 10 in Germany and France.

But working hard doesn't preclude playing just as hard, especially for Japan's new leisure-oriented *naisu midi* (middle-aged women) and growing "silver generation." These groups now support over 40 culture centers in Tokyo alone. These commercial leisure centers sell "self-improvement" in the form of such classes as *bonsai* making, classical calligraphy, and flower arranging. Senior citizen sports centers are also booming.

Leisure is becoming such a hot topic that Japan has a special organization to monitor trends in having fun. The Japan Leisure Development Center annually ranks the top 20 Japanese pastimes. Here's its list for 1986. •

## Japanese pastimes

| activity | participants in millions |
|---|---|
| 1. Eating out | 54.7 |
| 2. Driving | 49.1 |
| 3. Domestic sight-seeing and travel | 45.3 |
| 4. Drinking at bars, pubs, etc. | 40.3 |
| 5. Swimming (at a beach) | 37.9 |
| 6. Playing cards | 37.1 |
| 7. Exercising | 35.8 |
| 8. Visiting museums, gardens, zoos | 33.9 |
| 9. Visiting parks | 33.2 |
| 10. Gardening | 32.0 |
| 11. Picnics, hikes, walks | 30.5 |
| 12. Movies | 30.4 |
| 13. Bowling | 28.2 |
| 14. Pachinko (pinball) | 27.5 |
| 15. Jogging, running | 27.3 |
| 16. Music | 26.0 |
| 17. Sewing, weaving, embroidery | 25.2 |
| 18. Trips to hometown | 25.1 |
| 19. Sing-a-long bars | 25.1 |
| 20. Swimming at a pool | 24.9 |

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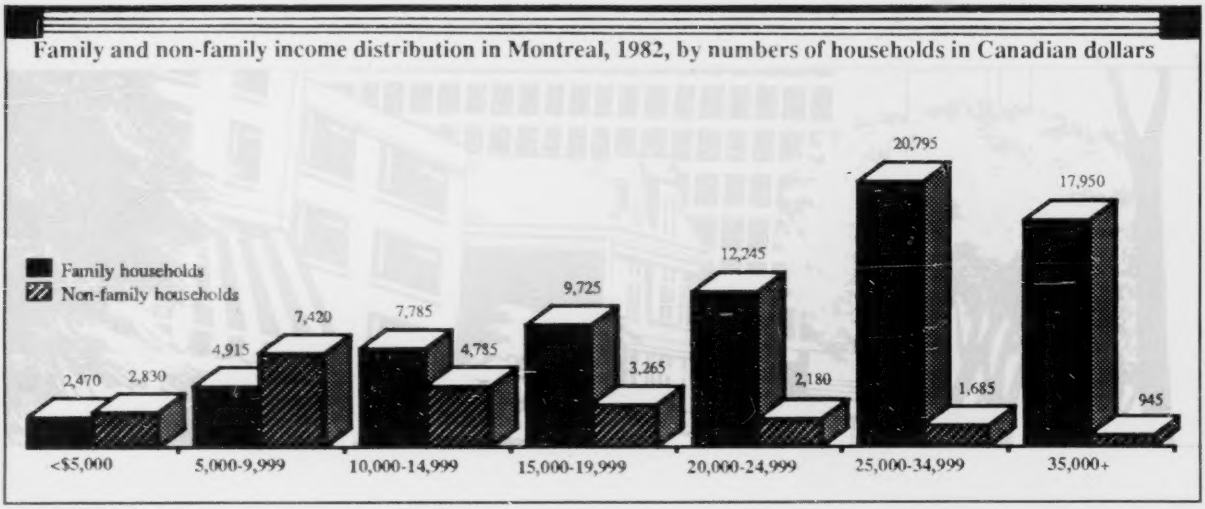
CONSUMER TRENDS AND MARKETS ABROAD
OCTOBER 1986 VOLUME 5, NUMBER 10



Family and non-family income distribution in Montreal, 1982, by numbers of households in Canadian dollars

Illustration by Diana Souza

Source: Statistics Canada

AREA PROFILE

## The Metro Area of Montreal

Montreal is a city where young men still give up their seats on the subway to older women. One of the most civilized and cosmopolitan of North American cities, it is the second largest city in Canada and the largest French-speaking city.

Of the 2.8 million people who lived there at census time in 1981, 45 percent chose both French and English as their official language, 41 percent chose French, and 1 percent used some other language. Fully 68 percent of Montreal residents said their mother tongue is French, and 68 percent also said they speak French at home. In Canada, 61 percent of the population claims English as its mother tongue, but in the province of Quebec, only 11 percent say English is their mother tongue.

The importance of bilingualism to the business culture of Montreal cannot be overemphasized. In the last decade, French-Canadians have taken an increasingly stronger role in business. The new generation of French-Canadians--baby boomers who have used education as a stepping-stone into business--are entrepreneurs who are aggressively moving into prominent roles in government and business. The group of 25-to-34-year-old French-Canadians are the first generation to assume a leadership role in business. Their move up the ladder has contributed in large measure to a lessening of tensions between the English and the French.

Upper-middle-class suburbs that as little as 10 years ago had only 10 percent of their residents who were of French-Canadian descent now have as many as 50 to 60 percent of their residents who are French-Canadians, but the economic status of the suburbs hasn't changed. What has changed is that more French-Canadians are gaining access to the middle and upper classes that live in the city.

*continued*

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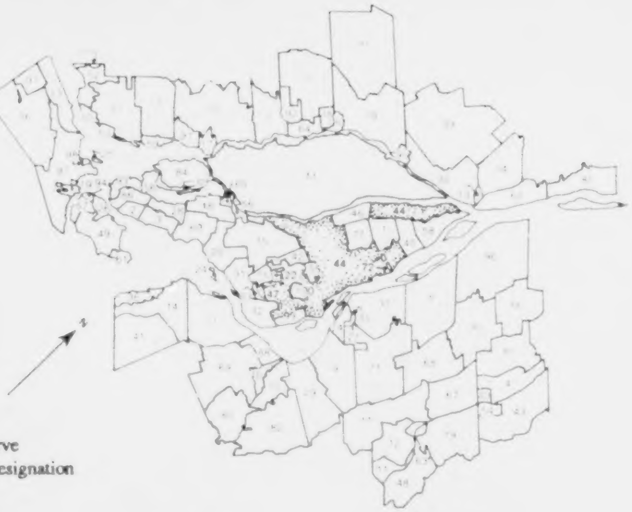
THIS MONTH: MONTREAL

### The Metropolitan Area of Montreal



Key:

V-Town
VL-Village
C-City
R-Indian Reserve
SD-Without Designation
P-Parish

1. Anjou, V
2. Baie-d'Urfe, V
3. Beaconsfield, C
4. Beloeil, V
5. Blainville, V
6. Bois-des-Filion, V
7. Boisbriand, V
8. Boucherville, V
9. Brossard, V
10. Candiac, V
11. Carignan, V
12. Chambly, V
13. Charlemagne, V
14. Chateauguay, V
15. Cote-Saint-Luc, C
16. Delson, V
17. Deux-Montagnes, C
18. Dollard-des-Ormeaux, V
19. Dorion, V
20. Dorval, C
21. Greenfield Park, V
22. Hampstead, V
23. Hudson, V
24. Ile Dorval, V
25. Ile-Cadieux, V
26. Ile-Perrot, V
27. Kahnawake 14, R
28. Kirkland, V
29. La Prairie, V
30. Lachenaie, V
31. Lachine, V
32. Lasalle, C
33. Laval, V
34. Le Gardeur, V
35. Lemoyne, V
36. Lery, V
37. Longueuil, V
38. Lorraine, V
39. Mascouche, V
40. McMasterville, VL
41. Mercier, V
42. Mont-Royal, V
43. Mont-Saint-Hilaire, V
44. Montreal, V
45. Montreal-Est, V
46. Montreal-Nord, V
47. Montreal-Ouest, V
48. Notre-Dame-de-Bon-Secours, P
49. Notre-Dame-de-l'Ile-Perrot, P
50. Oka, P
51. Oka, SD
52. Oka-sur-le-Lac, V
53. Otterburn Park, V
54. Outremont, V
56. Pierrefonds, V
57. Pincourt, V
58. Pointe-aux-Trembles, V
59. Pointe-Calumet, VL
60. Pointe-Claire, V
61. Pointe-du-Moulin, V
62. Repentigny, V
63. Richelieu, V
64. Rosemere, V
65. Roxboro, V
66. Saint-Amable, P
67. Saint-Basile-le-Grand, V
68. Saint-Bruno-de-Montarville, V
69. Saint-Constant, V
70. Saint-Eustache, V
71. Saint-Hubert, V
72. Saint-Jean-de-Dieu, P
73. Saint-Joseph-du-Lac, P
74. Saint-Lambert, V
75. Saint-Laurent, V
76. Saint-Lazare, P
77. Saint-Leonard, V
78. Saint-Louis-de-Terrebonne, P
79. Saint-Mathias, P
80. Saint-Mathieu, SD
81. Saint-Mathieu-de-Beloeil, P
82. Saint-Philippe, P
83. Saint-Pierre, V
84. Saint-Raphael-de-l'Ile-Bizard, P
85. Saint-Sulpice, P
86. Sainte-Anne-de-Bellevue, V
87. Sainte-Anne-des-Plaines, P
88. Sainte-Catherine, V
89. Sainte-Genevieve, V
90. Sainte-Julie, V
91. Sainte-Marthe-sur-le-Lac, V
92. Sainte-Therese, V
93. Senneville, VL
94. Terrasse-Vaudreuil, SD
95. Terrebonne, V
96. Varennes, V
97. Vaudreuil, V
98. Vaudreuil-sur-le-Lac, VL
99. Verdun, C
100. Westmount, C

Source: Statistics Canada

International Demographics

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English-speaking businesspeople who traditionally carried all the power in Montreal seem to harbor little resentment. A baby boomer of English descent who manages real estate in the city told us, "I conduct about 75 percent of my business deals in French even though my business contacts all speak English. If I speak French, I know if I am misunderstanding something. If we deal in English, I don't know if someone else is misunderstanding."

While the children of new immigrants to Montreal are required to attend French schools, there is little doubt that most residents of Montreal willingly learn two languages. From hotel housekeepers to bank tellers, from bus drivers to retailers, service employees switch between the two languages with little hesitation, depending on the preferences of the person being served.

United States' firms should assume that all representatives who are sent to Montreal--and for that matter, anywhere in Quebec Province--should be fluent in both French and English. It is simply the most courteous approach to doing business there.

Montreal is located on an island some 30 miles long and seven miles wide at the junction of the St. Lawrence and Ottawa Rivers. The city's average altitude is only 63 feet so that Mount Royal, for which it is named, is prominent at a height of 765 feet above sea level. Although much of the mountain area is devoted to parkland, the cities of Westmount and Outremount are well-to-do areas on Mount Royal's higher slopes. The land area of the metropolitan area is 2,814 square kilometers. Its 2,828,349 people create a population density of 1,004.9 persons per square kilometer.

Montreal has 665 census tracts. The Metropolitan Atlas Series on Montreal (ordering information under sources) provides a graphic analysis of the demographic characteristics of each census tract. Printed volumes provide the actual numbers. In general, the eastern portions of the census metropolitan area are French-speaking and the western areas are English-speaking, although as mentioned earlier, some middle-class areas that were formerly English are becoming more integrated.

Since 1870, the urbanized area has pushed out the borders of the city proper. Even though many suburbs have been annexed, the census metropolitan area now includes about 100 different municipalities. The largest of these in 1981 were Montreal-Nord, 94,914; Saint-Leonard, 79,429; La Salle, 76,299; and Saint-Laurent, 65,900, located on the same island as the city proper. North of the principal island are Laval with 268,335 residents and Repentigny, 34,419. Principal suburbs south of the city are Longueuil with 124, 320 residents and Saint-Hubert with 60,573.

While Montreal maintains its place as the second-largest city in Canada, tensions created by the French Separatist Movement partly caused it to be one of the slowest-growing cities between 1976 and 1981. Of Canadian metropolitan areas, only Sudbury, Windsor, and St. Catherines-Niagara grew less quickly than Montreal. Another factor influencing its slow growth was a 9.3 percent decline in population in the central city. At the same time, growth in the suburbs of the metropolitan area increased, giving it a net overall growth for the period. Two hundred thirteen census tracts, many on the outskirts of Montreal, had a net gain in population of from 20 percent to 219 percent, while some 452 tracts, most in the inner city, lost as much as 48 percent of their population.

New census figures for Montreal from the June 3, 1986 census are expected to be available this month. Preliminary results show that the decline in central city Montreal has stabilized and that gentrification of the city may mean growth once again. To obtain updated information on Montreal, call the number given at the end of this profile after October 1. Updates will appear in *International Demographics* as soon as they are available.

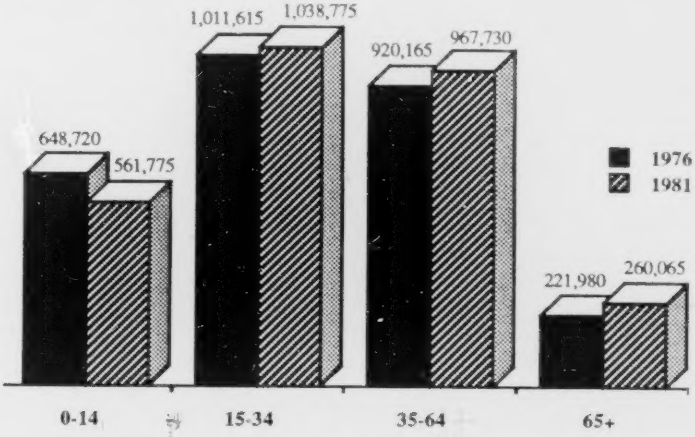
## AGE DISTRIBUTION

While 7. 3 percent of the Canadian population in general is aged 0 to 5, only 6.5 percent of the population in Montreal is that age, not an unusual situation in a large city with high migration rates. Only 22. 5 percent of Montreal's population is aged 5 to 19 while the proportion in Canada as a whole is 24.7 percent. Nearly 62 percent of the Montreal population falls between the ages of 20 and 64--the prime working ages. In Canada as a whole, 58 percent of the population is within the primary working ages. Montreal's elderly--age 65 plus--have nearly equal shares in the city and the nation with 9.2 percent in Montreal and 9.7 percent in Canada.

Montreal's population reflects the effects of Canada's post-war baby boom. In 1981, the two largest 10-year age groups were the 15-to-24-year-olds and the 25-to-34-year-olds. Of the 2.8 million people in Montreal, 37 percent were in this group. This is the group that in the United States is most likely to be considered in the yuppie category--young, upwardly mobile, urban professionals. There are more than a million people in that group in Montreal. One result is a cadre of stylish restaurants, a varied nightlife, a keen interest in fashion, and a city that is changing to meet the varied tastes of its occupants.

The Canadian baby boom peaked in 1959 when the crude birthrate was 27.4 births per 1,000 people. By 1978, it had declined to 15.3 and it has remained at that level. Although Montreal is 79 percent Roman Catholic, it does not have the high fertility levels often associated

**Population of the Census Metropolitan Area of Montreal by age, 1976 and 1981**



**Population of the Census Metropolitan Area of Montreal by age and sex, 1981**

| *age group* | *both sexes* | *females* | *males* |
|---|---|---|---|
| 0-4 | 183,040 | 94,005 | 89,035 |
| 5-9 | 177,205 | 90,740 | 86,465 |
| 10-14 | 201,530 | 103,130 | 98,400 |
| 15-19 | 256,290 | 130,085 | 126,205 |
| 20-24 | 283,320 | 140,745 | 142,575 |
| 25-34* | 499,170 | 245,690 | 253,480 |
| 35-44* | 380,700 | 187,130 | 193,570 |
| 45-54* | 326,195 | 160,050 | 166,145 |
| 55-64* | 260,835 | 120,855 | 139,980 |
| 65-69 | 96,125 | 41,300 | 54,825 |
| 70+ | 163,940 | 59,745 | 104,195 |
| All ages | 2,828,355 | 1,373,480 | 1,454,875 |

*10-year age groups Source: Statistics Canada

## TIPS ON TRENDS

### Europeans smoke less

The 1960s and 1970s saw more smoke rising in Europe. But since 1980, Europeans have been cutting back, according to a recent E.C. commission report. In 1982, Europeans bought about 480 billion cigarettes, down from the 500 billion they smoked only two years previous.

Consumption in the United Kingdom fell as much as 26 percent. However, in such countries as Greece, Denmark, Italy, and France, consumption continues to rise. Those aged 15 and over in Greece and Italy smoke over 2,600 cigarettes a year.

Two trends have emerged according to the report. Smoking remains predominantly a masculine vice. Only in the Netherlands, Ireland, and Denmark do women go one-for-one with men, with nearly half the smokers of these countries women. Filter-tipped cigarettes are rising in popularity--in 1982 over 80 percent of all cigarettes sold were filter-tipped. Again, only in the Netherlands, Denmark, and France did non-filters hold on, with 30 percent of sales filter-tipped.

### Whose counting now?
### Population counts by satellite

Door-to-door census takers, watch out. Your jobs may already be on the line. In one more new application of earth photos taken from NASA satellites, University of Utah geographers used remote sensing maps to count people.

Kyun-Hung Han used Landsat images to calculate populations in South Korea's largest cities and several cities in North Korea. To test the reliability of population estimates based on satellite data, Han identified the boundary of a city--Inchon, South Korea, for example--using a Landsat map shot a few years previous. The satellite image shows the city as blue in the midst of surrounding red vegetation. Using census figures for the same year, Han found a correlation between the population and the area of the city--the population density.

Han then turned to a recent Landsat map of Inchon. Without consulting government census data, he estimated the growth of the city's population based on the increased size of the built-up area and the previously calculated density. Han compared his results with census counts and found his estimates to be about 95 percent accurate.

Han used the densities of South Korean cities shown in satellite pictures and applied them to cities in North Korea, which have fairly similiar population profiles. From his data, Han calculated population growth for North Korean cities.

These satellite techniques offer a chance to get much more accurate, up-to-date population counts at relatively low cost in hard-to-calculate areas, according to University of Utah geographers. The only thing holding back widespread use of satelitte images in population estimation is the lack of international awareness and acceptance of the technique and its reliability, accoring to the University of Utah news service.

Source: *University of Utah News*

with Catholic areas. In fact, in 1981, women in Quebec between the ages of 15 and 34-- the usual child-bearing ages--had the lowest fertility rates of women from any province in the entire country. The 1982-83 fertility rate in Quebec province was 1.6 children per woman. In Montreal the reported fertility rate was 2.2 children per woman. A report from Statistics Canada in 1983 commented that the only reason the birthrate in Quebec did not decline even further is that there is a high proportion of women between the ages of 15 and 40.

Writing in **Demolinguistic Situation in Canada, Past Trends and Future Prospects,** in 1982, Rejean Lachapelle and Jacques Henripin suggest one possible explanation:

"It might be advanced that as long as French Quebeckers lived in obedience to the dictates of their specific culture, they were led to have many children. This culture was strongly impregnated with Catholicism, gave little importance to schooling but a great deal to family life, and above all, gave little encouragement to those seeking social and financial success. As French Quebeckers opened their minds to a more modern concept of life, they may have been inspired to place new goals and new satisfactions above having children. Or the explanation may be even more prosaic: their recent access to material comfort may have changed them more radically than would have been the case with other groups who were better able to defend themselves and who were armed with a moral code based on something other than a discarded religion. "

Montrealers who were interviewed for this profile believe that the decreased influence of the Catholic Church on younger French-Canadians has a great deal to do with their interest in commerce--an interest not commonly held by their parents.

The fall in fertility among Quebec residents means that Quebec's population is losing share as a proportion of Canada's total population. In 1951, Quebec was nearly 30 percent of the total population. By 2001, according to Statistics Canada, it could be less than 25 percent.

Life expectancy at birth in Quebec in 1981 was 71 for men and 78.7 years for women. In Canada as a whole, it was 71.9 years for men and 78.9 years for women.

Although Montreal has the air of a city of immigrants, in fact, only 17 percent of the population was born outside of Canada. Sixty-three percent of those not born in Canada were born in Europe. The majority of the rest were born in Asian countries. The 1986 census will undoubtedly show a higher proportion of Asians since Asian immigration to Canada has increased in the past five years.

As in most metropolitan areas, immigrants make their mark on the city, no matter what their origins. In Montreal, you can determine the latest wave of immigration by the types of new shops and restaurants along Sherbrooke St. from Saint Laurent Blvd. west to Bleury Ave. Older immigrants contributed Indian restaurants, Iranian rug shops, and Chinese food shops, while newer immigrants are establishing their own Vietnamese eateries.

### HOUSEHOLDS AND FAMILIES

In Canada, a census family is persons living in the same dwelling who have a husband/wife, or parent/never-married child relationship. There were 742,320 census families in private households in Montreal in 1981. There were an average of 3.2 persons in a family and an average of 1.3 children per family that had children.

Among census families, 86 percent were husband-wife families. Fifty-four percent of the families--or about a half million--were husband-wife, with children. About 17 percent were childless couples. Of the 742,320 census families, nearly 14 percent were single-parent families. The vast majority were headed by women. Of the husband-wife families, 48 percent were dual-earner couples. Seventy-four percent of lone-parent families had a worker in the labor force.

There were 1,026,920 households in Montreal in 1981 with an average of 2.7 persons per household. Of these, 71 percent were census family households and 29 percent were nonfamily households. Nearly 24 percent of households had only a single person.

Montreal had a higher share of single-person households than either Quebec province or Canada as a whole. Canada had 20 percent of its households made up of only one person. In Quebec, only 19.6 percent of households were one person only. The vast majority of one-person households in Montreal were in the inner-city census tracts. There were 742,180 families living in private households. Of those families, 68 percent had children at home. Nearly 28 percent had only one child at home. Only 14 percent had three or more children at home.

### HOUSING

There were 1,026,895 occupied dwellings in Montreal in 1981 with an average of 5 rooms each. Of those, 42 percent were owner-occupied. Of the more than a million dwellings, the majority were in some kind of multiple unit, much as in most large cities. Only 27 percent were single detached homes.

Montreal is not a city of high rise apartment buildings. Only 9 percent of occupied dwellings were in apartments of five stories or more, whereas 38 percent were in buildings of less than five stories. About 25 percent of occupied dwellings are in single attached housing or duplexes. In the downtown areas, new high-rise apartments are just beginning to appear. In the Old City, near the harbor, there is a Greenwich Village feeling as the new young white-collar workers from the financial district convert lofts and older warehouses into apartments. The suburbs built in the 1950s are primarily single-family dwellings.

More than half of the housing in Montreal was built in the last 20 years so, in general, housing is modern and in fairly good repair. More than 98 percent of housing has indoor plumbing and 87 percent has central heating. Montreal residents take pride in their buildings and keep them in good repair. In 1981, only 7 percent of occupied dwellings were judged to need major repairs, and only another 16 percent needed minor repairs. The average value of a dwelling in Montreal in 1981 was $66,338.

The average gross rent paid was $293 Canadian. Owners paid an average of $441 per month for their housing.

### EDUCATION

The educational system in Montreal is tied to both religion and language.

### Distribution of families by income group, in percent, 1982

| *income group (Canadian dollars)* | *Percent* |
|---|---|
| Under $5,000 | 1.8 |
| $5,000-11,999 | 9.3 |
| $12,000-14,999 | 6.3 |
| $15,000-17,999 | 6.9 |
| $18,000-21,999 | 7.3 |
| $22,000-24,999 | 6.3 |
| $25,000-29,999 | 12.1 |
| $30,000-34,999 | 10.7 |
| $35,000+ | 39.2 |

### Expenditure patterns for all households in Canadian dollars

*$26,838--total household expenditures*

20.3%---taxes
17.2%---shelter
15.8%---food
11.7%---clothing
10.2%---private transport.
4.8%---security
4.0%---recreation
3.9%---household operation
3.3%---tobacco, alcohol
3.1%---furnishings/equipment
2.6%---miscellaneous
1.9%---personal care
1.7%---health care
1.7%---charitable
1.4%---public transport.
0.8%---education
0.7%---reading materials

### Appliance ownership in Montreal

| | | |
|---|---|---|
| **Freezers** | | |
| 1980 | | 25% |
| 1984 | | 32% |
| **Electric washing machines** | | |
| 1980 | | 78% |
| 1984 | | 75% |
| **Clothes driers** | | |
| 1980 | | 56% |
| 1984 | | 60% |
| **Air conditioners** | | |
| 1984 | | 15% |
| **Color TVs** (two or more) | | |
| 1980 | | 10% |
| 1984 | | 17% |
| **Autos** | (one) | (two or more) |
| 1980 | 56% | 14% |
| 1984 | 53% | 13% |

*Source: Statistics Canada*

Thus, four separate public school boards provide the bulk of the education. Students may enroll in a Catholic or a Protestant school where the majority of teaching is done in either English or French. Even in schools where English is used for most teaching, intensive French courses are offered because in order to graduate students must demonstrate competency in French.

COMPARATIVELY SPEAKING

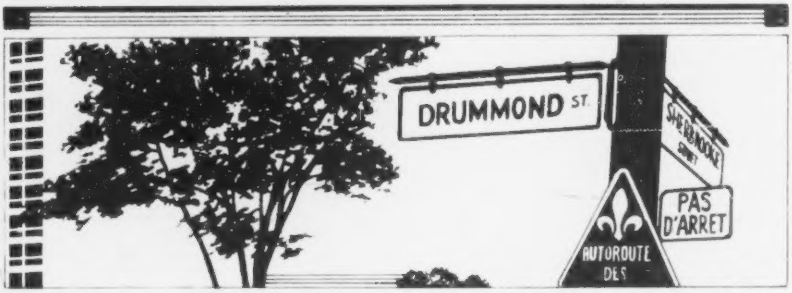


Illustration by Diana Souza

***Just over 18 percent of Montreal residents consider English their mother tongue, compared to 11 percent of Quebec residents and about 61 percent of all Canadians.***

COMPARATIVELY SPEAKING

Of the 2.2 million people aged 15 and over in Montreal in 1981, only about 12 percent were still in school full-time. About a quarter of the population aged 15 and over had completed school only through grade 9. About half of them were still in school, so in actuality those who leave school before high school are probably only about 10 percent of the population.

The Montreal system of education is more like the European system in that there is less emphasis on a university education and more emphasis on trades. About 35 percent of the population finished their education with high school. Another 20 percent have education beyond high school but in some kind of non-university program. About 8 percent of the population aged 15 and over had attended university but not completed a degree, and only about 9 percent had earned a university degree.

### LABOR FORCE AND INCOME

About 71 percent of the population aged 15 and over that was not in school was in the labor force. The labor force was 41 percent women. Fifty-one percent of women aged 15 and older were in the work force.

While the occupations of men were fairly evenly distributed among a number of categories, the single largest occupational category for women was clerical work with 39 percent of the working women employed in those jobs. The next largest category for women was service occupations which employed 11 percent of them.

The largest employment category for men was still manufacturing where nearly 16 percent of them found employment. However, another 14 percent were employed in administrative and managerial jobs. The clerical, sales, and service categories each provided about another 10 percent of men with jobs.

Just as in developed nations all over the world, Montreal's economy relies heavily on service jobs. In 1981, about a half million--or about a third--of jobs were in commerce, business, and personal service, followed by manufacturing with about 25 percent, or 337,000 jobs, and trade with nearly a quarter million.

The median income for men in 1980 was $15,182. For women it was $7,012. However, employed men and women had higher medians: $16,015 for men and $9,324 for women. (All income figures are in Canadian dollars.) Median family income in 1980 was $24,179, while median household income was lower at $20,771.

### CONSUMPTION

Montreal is a cosmopolitan city with many exciting ethnic restaurants and a fairly high percentage of one-person households. The 1984 survey *Family Food Expenditure in Canada--Selected Cities* found that in Montreal an average family of 2.57 persons spent $84.19 (Canadian) on food and that 27 percent of it was on restaurant and snack food. In Ottawa, by contrast, 34 percent of the average family's food dollar was spent in restaurants. In Toronto, 29 percent of the food dollar went for restaurants and snack foods. West Coast cities held up their end of restaurant dining as well. In Vancouver 31 percent of the food dollar went to eating out. Montreal was about in line with the rest of its own province. Quebeckers spent about 29 percent of their food dollar for food outside the home as well.

Of the 27 percent of their food dollar that Montrealers spent for eating out, 49 percent went to dinners, 36 percent to lunches, and only 6 percent to breakfast. Between-meal snacks took up nearly 9 percent of the family's eating-out dollar.

Outdoor cafes and coffee shops abound in Montreal as the residents try to take advantage of the summer months. At any time of the day, coffee shops--the A.L. Van Houtte chain, in particular--host small groups of retirees and office workers, couples meeting after work, and

**Where Montrealers work**

| | |
|---|---|
| Managerial/professional | 446,346 |
| Clerical | 356,920 |
| Sales | 173,382 |
| Service | 248,346 |
| Primary occupation | 17,351 |
| Processing | 287,999 |
| Transportation | 55,026 |
| Material handling | 87,396 |
| Construction | 64,444 |

*Source: Statistics Canada*

students, who sip espresso from tiny cups or tea from giant cups, and munch on croissants and Danish. The European tradition of long leisurely hours over food is much more prevalent in Montreal than in large U. S. cities.

**SOURCES**

Statistics Canada has printed reports with data reported by 665 census tracts in Montreal. One of the most important is Catalogue No. 99-920, the Montreal edition of the Metropolitan Atlas Series which portrays data at the census tract level. The tabular bulletins that provide the actual numbers supporting the graphic displays are 95-918 and 95-959.

The *Metropolitan Atlas Series-Montreal* and volume 95-918 each cost $8.50 inside Canada and $10.20 outside Canada. Volume 95-959 costs $24 in Canada and $28.80 outside. These three volumes will provide you with considerable detail, census tract by census tract, and are probably sufficient for desk research on Montreal.

*Family Food Expenditure in Canada* (Catalogue 62-554) costs $11.10 in Canada and $13.30 outside.

Additional information on Montreal (and updated numbers after October) are available by calling the Statistics Canada reference center in Quebec at 514-283-5725. If you are in Canada, the toll-free number is 800-361-2831.

Order publications from: Statistics Canada, Publications Sales and Service, Ottawa, Canada K1A OT6.

*--Doris Walsh*

## COMING UP

**City profile**--Lima, Peru

**1986 Cumulative Index**--indexes all articles and major book reviews appearing this year.

## TIPS ON TRADE

### Real Log Homes, Inc. enters Japanese market

Can you picture two-story gambrel-roof log cabins silhouetted against Japan's misty peaks? Real Log Homes, Inc. of Missoula, Montana could, and so did a sufficient number of Japan's latest wave of urban escapees to convince Real Log Homes to go East.

Capitalizing on the Japanese urbanites longing for weekend retreats in Japan's mountain country and rising income levels, Real Log Homes entered the Japan External Trade Organization's Made in USA Fair and found a ready market for their products. Pre-cut log homes hold a rustic appeal for many Japanese as well as an economical price tag in contrast to typical Japanese housing.

Many mid-sized Japanese companies build special retreats in the mountains for their employees as a perk for company employment. These *bassho* offer all the amenities of city life in a rustic setting with dormitory-style lofts where groups can sleep on fold-up bedding placed on the floor at night. Bedding can then be stowed in closets for daytime hours. Pre-cut log homes are especially suitable for this kind of lodging where space and economy are major requirements.

Real Log Homes, the largest seller of pre-cut homes in North America, just may find a home in the East.

Source: *JETRO Monitor*, August 1986.

### *Business Week* to publish magazine for Chinese leaders and execs

A media-hungry Chinese business community is about to get full fare. In a joint venture with the China Foreign Economic Relations and Trade Publishing House, *Business Week* will publish a monthly Chinese business magazine, *International Business and Management*.

Aimed at Chinese business people and government leaders, circulation will start at 25,000. The first issue is to appear in December 1986. It will consist of articles translated from *Business Week*, *Business Week International*, and *International Management*, all McGraw-Hill publications.

"Initially, *International Business and Management* will consist of 63 editorial pages and 21 advertising pages per issue," stated Earl S. Moore, Jr., vice president and director, international publishing, for *Business Week* and *International Management*." Only full-page ads are being accepted and there has been considerable interest in this new magazine from many international advertisers."

### Macintosh Plus with Kanji/Talk on Japanese market

Already a success in France, internationally minded Apple Computer, Inc. is ready for a go in Japan. *Waa-Puro* (word processor) crazy Japanese, used to home-grown brands, are ready for the Mac's famous easy-to-use, yet powerful features.

Except for the new keyboard displaying 50 Japanese phonetic symbols, the Mac's outward appearance is unchanged. The new operating system, Kanji/Talk, allows users to access the three traditional Japanese alphabets as well as English letters, according to Apple.

Source: *Infoworld*, May 26, 1986

# TIPS ON TRADE

## Japan's Famicon Fever

Move over Hello Kitty. You too Ultraman. Famicon, Japan's new high-tech sensation, is now the most popular toy ever to be made in Asia's electronics wonderland.

With over 7 million of these TV game computers sold since 1983, Nintendo Company is racing to keep up with demand, while other manufacturers crowd the market with look-alikes trying to cash in on what's being called the "Famicon (family computer) phenomenon."

Famicon costs about $82. Software is sold separately in plug-in cartridges and magnetic disks. Nintendo's best-selling game, "Super Mario Brothers," netted the company about $68 million and spawned a best-selling book *How to Win at Super Mario Brothers*.

Why such a smash? Industry analysts in Japan feel that Famicon's appeal comes from users feeling in command while being challenged to perform. Users tend to be children between the ages of 7 and 15.

Nintendo intends to keep challenging its customers as they age. Its next step is to network its over 6 million users to a central computer over telephone lines for a full range of new media services.

## Big Blue Beats Japanese Giants

A survey of 1,500 Japanese companies found IBM's model 5550 favored over Fujitsu's 9495 series and NEC's 9800 series. Big Blue now holds a 24 percent share of the PC market in Japan.

The survey also found that experimentation with different brands of computers is waning in Japan. Of the companies surveyed, 71 percent were using only one type of computer, as compared with about 42 percent last year. *Source: JETRO*

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*Resultats Generaux--Age, sexe, etat civil (marital status), nationalite et menages* (households) treats these categories from the national to commune level. It costs 200 BF, or about $4.50.

*Resultats Generaux--Logements*: The same approach as above for housing. It costs 300 BF, or about $6.60.

*Enquete sur les Budgets des Menages 1978-79*: Published in 1984, this study gives some insight into household budgeting for the country as a whole, and includes statistics by dwelling size and number of working heads of household. It costs 300 BF, or about $6.60.

*Perspectives de Population, 1981-2025* projects Belgium's declining population trend over the coming four decades according to age by regions, including that of Brussels. It costs 300 BF, or about $6.60.

INS also publishes an exhaustive statistical yearbook, *Annuaire statistique de la Belgique*, the most recent one being for 1984 at 900 BF, or about $19.80, and a 228-page paperback version, *Annuaire statistique de poche*, an excellent summary of vital statistics. It costs 160 BF, or about $3.50. An eight-page pocket-size statistical overview is free--as is the INS catalog giving prices for additional census documents and a wide range of other publications. Contact the Brussels office INS by phone at (02) 513 96 50.

The monthly *Bulletin of the Banque Nationale de Belgique* provides a well-documented running tabulation on the country's economy, including relevant demographic data. Of superb quality, it can be obtained by annual subscription (1,450 BF, or $32 by air; 650 BF, or about $15, by surface) or by the number (145 BF, or about $3; and 65 BF, or about $1.50). Write to the bank at boulevard de Berlaimont, 5, B-1000 Brussels.

An amply documented 75-page statistical study of the Brussels region is published by Agglomeration de Bruxelles, Service de Documentation, rue de la Loi, 15, Bte No. 101, B-1040. Write concerning current availability and cost.

"Europe's Population--Major Trends and Implications," issued by the Conference Board in Europe, is useful despite its 1980 publication date for the trends it spots in Belgium and the comparisons it makes with 15 other countries. Copies are available from the Board's New York City or Ottawa offices, or write the Brussels office at avenue Louise, 326, Bte 48, B-1050.

The French-language daily *Le Soir* published four articles during the summer of 1982 looking into initial results of the previous year's census. The series at 64 BF, or about $1.50, plus postage is available from the newspaper's back-number service at place de Louvain, 21, B-1000 Brussels.

The Belgian-American Chamber of Commerce, 50 Rockefeller Plaza, New York, NY 10020, in previous years has published a directory of more than 1,500 U.S. companies doing business in Belgium. Ask, too, about the monthly *Belgian-American Trade Review*.

In addition to the substantial business and general-interest press--in some cases publications offer separate editions in French and Flemish--the large English-speaking community supports *The Bulletin*, a general-interest weekly, and a newer sister monthly, *Prospects*, focusing on Belgian business. Annual introductory subscription for the former is 1800 BF, or about $40, and for the latter 800 BF, or about $18. Write to Ackroyd Publications, avenue Louise, 382, B-1050 Brussels.

The Comite Belge de la Distribution, rue Marianne, 34, B-1180 Brussels, can furnish specific trade information. An annual survey of Belgian media is compiled by the Centre d'Information sur les Media, Galerie Agora, bureau 110, rue Marche aux Herbes 105, bte 6, B-1000 Brussels. *--Peter Inserra*

DESKTOP DEMOGRAPHICS

# Demo-graphics

*This is the first in a series of reports that review and examine new personal computer products for displaying and analyzing international demographic data.*

Hit a few keys on your IBM PC or Apple and see Sweden's age structure in 1985. Hit a few more and see it in 2025, or compared to Brazil's age structure.

*Demo-graphics* is a program that projects population for 146 countries from 1975 to 2125. The software and data are on one floppy disk. The program is menu-driven and almost self-explanatory.

You can display population pyramids of one or two countries, rectilinear line graphs of various demographic indicators for one or two countries, and sequential line plots showing several projection series for one country.

*Demo-graphics* has built-in assumptions that produce the projections, but you can change them to see what alternative scenarios hold in store for different regions. You can change seven assumptions for any five-year period from 1975 to 2125--total population, age-specific fertility and mortality rates, age groups, total fertility rate, infant and child mortality rates, and life expectancy at birth. In most cases, you have to enter the data by sex.

The program has room for 78 extra "countries," which you can add yourself. These can be any geographic area, of course, such as states or cities. To create a new country, you have to enter the total male and female population, percent males and females in each five-year group, age-specific mortality rates for men and women, the sex ratio at birth, and age-specific fertility rates for women aged 15-44. If you don't have the data for a region, you can copy one that is similar to it and change the data according to what you do know. For example, you could assume that a state's fertility and mortality rates are the same as for the country as a whole and edit only the population and age distribution data that you can obtain.

*Demo-graphics* is published by COMPress, P.O. Box 102, Wentworth, NH 03282. It costs $95 and runs on an IBM PC or compatible with 128K RAM. An Apple version is available for $85 from CONDUIT, P.O. Box 388k, Iowa City, IA 52244. •

3.1%
302 3.1%
303 3.4%
338 3.8%
372 1.1%
405 .0%
397 .9%
362 8%
373 9%
288
164
115 .7%
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FEATURE

# Canadian smokers

One in three Canadians smokes daily and an additional 3 million non-smoking adults live with someone who smokes. That adds up to nearly half of the Canadian population breathing smokey air at home and work.

Canadian men are more likely than women to smoke at all ages, except for ages 15 to 24. Thirty percent of women aged 15 to 24 smoke daily, compared to 27 percent of men.

These findings are based on preliminary data from Statistics Canada's new annual General Social Survey. The first GSS, conducted in September 1985, collected data on adult health and social support for the elderly. About 11,000 people aged 15 and over from 11 provinces were interviewed.

Despite bad news on smoking adults, four out of five Canadians describe their health as "excellent" or "good." In addition, the same proportion of Canadians drink alcoholic beverages as in 1978. Sixty-three percent drink alcohol at least once a month, with men at all ages more likely to do so than women (74 percent versus 53 percent).

Elderly Canadians are a spry lot, according to survey findings. Only one in ten of the over 65 set said their health was "poor." About one in six provide such services as babysitting or transportation outside their own household. Of those over 55 who were not institutionalized, most were able to carry out daily activities such as light housework and grocery shopping. However, heavy housework and yard work were no-no's for 3 out of 10 in the over-55 set.

For more detailed information on the 1985 GSS, contact Janet Hagey (613-991-2572) or Gareth Jones (613-990-9293) at Statistics Canada's Housing, Family and Social Statistics Division. A detailed report on the first GSS is to be released in February 1987. A set of preliminary tables and a public-use microdata file are now available. •

FEATURE

# Hot new business fields in Japan

What do such odd-sounding ventures as rental color labs, capsule hotels, and bedtown bars tell you about up-and-coming new businesses in Japan? Simply put, they fairly yell *service*-service tagged to the uniquenesses of life in Japan.

In what other country would you be offered a bed right in the bar where you'd spent a hard night drinking, at a price considerably lower than what you'd have to pay for taxi fare home? Since many white-collar workers go out with the boys after work and miss the last train home (a one-and-a-half hour ride on average), this service makes sense. So does do-it-yourself color processing labs for camera-crazies with no room at home for darkrooms.

Although many of Japan's hot, new business fields are exclusively home territory for Japanese marketers, others offer import opportunities for overseas business people. Here are a few of the fields for small business expansion chosen most-likely-to-succeed by Japan's *Kei-eisha Kaiho* (Executive Report) magazine.

At the top of the list of import possibilities is services to the elderly, followed closely by educational materials for *juku*, or cram schools. As a full command of written English is essential for success on college-entrance exams, this area provides excellent import opportunities. Services to and equipment for Japan's extremely popular athletic clubs is another good area. And, as catalog shopping is starting to show some long-awaited movement, this service area offers many opportunities for creative marketing of imported goods. Antiques, especially from abroad, offer another untapped area.

*Kei-eisha Kaiho* also mentions the fledgling express package delivery industry, dress re-making, house cleaning, house remodeling, 24-hour restaurants, movers, minitheaters, and information services.

## PUBLICATIONS

Canadian Social Trends, Statistics Canada, Ontario, Canada, 1986.

*Canadian Social Trends*, Statistics Canada's new quarterly magazine, should do for marketers looking at our top export market's psychographics what *American Demographics* magazine does for marketers looking at the changing American lifestyle.

*Canadian Social Trends* identifies, describes, and interprets major social and demographic trends affecting Canadian society in a readable magazine format. Articles are written in non-technical language with easy-to-read charts and tables.

Article titles in the first issue include "Families: Diversity the New Norm" and "Changing Health Risks." Trend reports discuss Canada in the 21st century, foreign students, child care, births to unmarried women, and private education.

To order *Canadian Social Trends* (11-008E, 4 issues/$44), contact Publication Sales and Services, Statistics Canada, Ottawa, K1A OT6; telephone, 613-993-7276.

Market Research Handbook 1985-86, ISSN, 0590-9325, No. 63-224 (Annual), 1986, 838 pp., $75.00 in Canada, $90.00 elsewhere.

This annual Statistics Canada publication presents extensive economic and demographic data essential for planners in business and industry.

Data include selected economic indicators; government revenues, expenditures, and employment at all levels; trends in merchandising and services; population characteristics, personal income, and expenditures; and housing, motor vehicles, household facilities and equipment.

Fifty-five charts, 36 maps, and over 260 detailed tables make this annual publication a comprehensive reference volume.

Infomat, Statistics Canada, Ontario, Canada, 1986.

Statistics Canada's weekly review of the most important statistics of the week, *Infomat* , has a new design with easier-to-read tables and charts. The front-page Overview section gives you an idea of what's happening in Canada in one quick glance.

Articles cite the most recent economic and social data available, describe current trends, and point out significant changes. Regular features include a complete list of publications released by Statistics Canada during the week, a table of key economic indicators, and a list of upcoming data releases.

Order *Infomat* ( 11-002E--weekly, $3/$150) from Publications Sales and Services, Statistics Canada, Ottawa, Ontario, K1A OT6. Send money order or check payable to the Receiver General for Canada.

### *For Our Subscribers*

**Special 125-page December Issue** The December issue of *International Demographics* will be a reference volume updating demographic information on 50 of the best potential markets for consumer goods and services. It will appear annually, updating information we have been providing throughout the year. The annual index will appear in the Nov. issue. Your comments are always welcome.

FEATURE

# London boroughs--future winners and losers

Greater London may be losing population as a whole, but the future for some boroughs is anything but bleak. Recently released projections for population growth in the boroughs of London can give you a good idea of the winners and losers in and around the city of London.

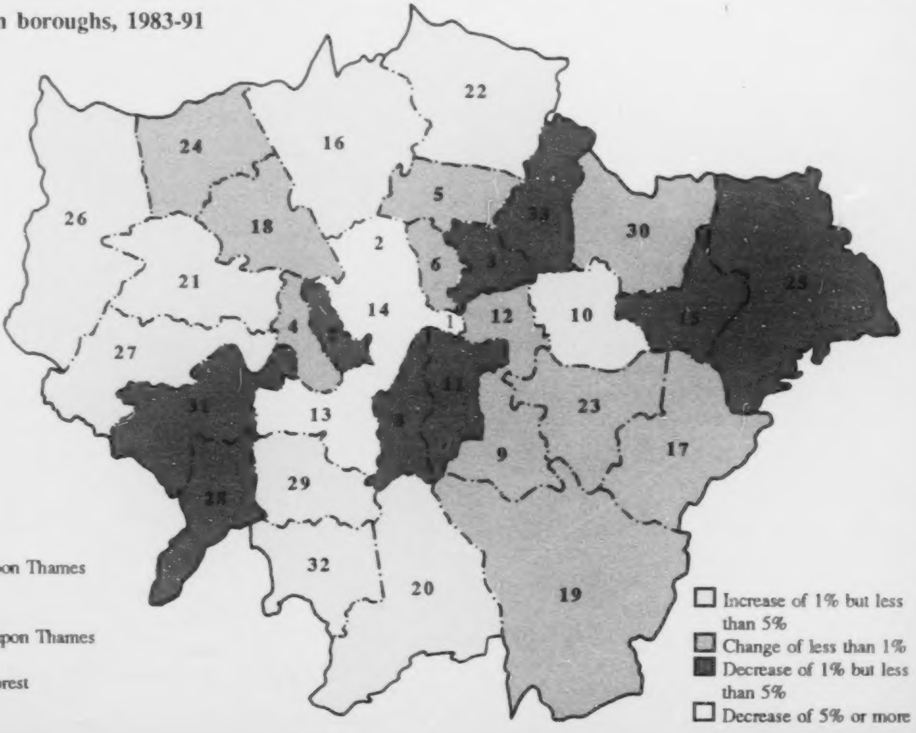
Greater London and the metropolitan counties all have projected population declines for the period 1983-91. The large annual population losses from Greater London, particularly the Inner London boroughs, however, are expected to continue slowing--a trend begun in the late 1970s and early 1980s. Moderate population losses of about 2.5 percent are projected for Inner London, while Outer London holds steady with a minimal 0.2 percent increase projected.

The boroughs of Westminster, Camden, and Wandsworth are the projected heavy losers in the period 1983 to 2001. The population of Westminster is projected to decline by nearly 10 percent in the period 1983 to 1991, continuing its decline to 2001, decreasing by a total of 14.5 percent. Camden follows a similar pattern, declining by 7.4 percent by 1991 and by 12.1 percent by 2001. Wandsworth is to lose nearly 6 percent of its population by 1991, almost doubling its loss by 2001 to nearly 11 percent.

On the other hand, winners include Newham, Merton, Sutton, and Barnet, with rapid population rises expected between 1983 and 1991 with a continuing trend in growth to 2001. Newham, which grew just under 1 percent from 1983 to 1986, is expected to increase by 7.8 percent during the period 1983 to 2001. Merton gains a total of 5.1 percent by 2001; Sutton, 6 percent; and Barnet, 5.5 percent.

More detailed projection information is to be released by Great Britain's Office of Population Censuses and Surveys in their publication *Population projections: area 1983-2001*, Series PP3 no. 6. Projections for the period 2002 to 2011 are available upon request. Contact Regional Demography Unit, Office of Population Censuses and Surveys, St. Catherines House, 10 Kingsway, London WC2B 6JP; telephone, 01-242 0262, extension 2180.

**Projected change in London boroughs, 1983-91**



1. City of London
2. Camden
3. Hackney
4. Hammersmith and Fulham
5. Haringey
6. Islington
7. Kensington and Chelsea
8. Lambeth
9. Lewisham
10. Newham
11. Southwark
12. Tower Hamlets
13. Wadsworth
14. City of Westminster
15. Barking and Dagenham
16. Barnet
17. Bexley
18. Brent
19. Bromley
20. Croydon
21. Ealing
22. Enfield
23. Greenwich
24. Harrow
25. Havering
26. Hillingdon
27. Hounslow
28. Kingston upon Thames
29. Merton
30. Redbridge
31. Richmond upon Thames
32. Sutton
33. Waltham Forest

Source: *OPCS Monitor*

# REGIONS

## *EUROPE*

### One-parent families up in the United Kingdom

As in all European Community countries, the number of one-parent families has risen sharply in England. Lone-parent families have doubled since 1961 in England.

The increase during the 1970s in families headed by a lone parent continues in the 1980s. From 1982 to 1984, 13 percent of all families with dependent children were headed by a lone parent, compared with 8 percent from 1971 to 1973, nearly a two-thirds increase.

Families headed by a lone father remained stable over the period, however. The proportions of single and of divorced lone mothers more than doubled, with no change in the proportions of widowed or separated lone mothers.

A recently released report on social conditions by a European Community commission estimates that one in every 12 European children lives in a single-parent family.

**Families by type, and for lone mothers, by marital status: 1971-1984 (in percent)**

Families with dependent children*

| Family type | 1971-1973 | 1973-1975 | 1975-1977 | 1977-1979 | 1979-1981 | 1981-1982 | 1982-1984 |
|---|---|---|---|---|---|---|---|
| Married couple** | 92 | 91 | 90 | 89 | 88 | 87 | 87 |
| Lone mother | 7 | 8 | 9 | 10 | 10 | 12 | 12 |
| Single | 1 | 1 | 2 | 2 | 2 | 3 | 3 |
| Widowed | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Divorced | 2 | 3 | 3 | 4 | 4 | 5 | 5 |
| Separated | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Lone father | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| All lone parents | 8 | 9 | 10 | 11 | 12 | 13 | 13 |
| Base = 100% | 14,105 | 13,655 | 13,972 | 13,178 | 12,984 | 11,540 | 10,460 |

* Dependent children are persons aged under 16, or aged 16-18 and in full-time education.

** Including married women whose husbands were not defined as resident in the household.

Source: *OPCS Monitor*

### In West Germany alcohol abuse still no. 1

One and a half million West Germans are alcoholics, according to a report issued by Health Minister Rita Sussmuth. This finding comes as average consumption of pure alcohol is decreasing, from 12.7 liters per person in 1980 to 11.1 liters in 1985.

Of other drug abusers, 50,000 West Germans are drug addicts, and a further half million abuse medicines. An estimated 10 percent of youths under 24--about 1.1 million--have tried drugs at least once.

### 11 million West Germans work for mid-sized firms

About half of all West German workers are employed in middle-sized firms, according to a survey conducted by the West German business magazine *Impulse*.

The first study of its scope in over 10 years, the survey also found that medium-sized firms produced nearly half the business volume of West Germany's private sector in 1984. The average mid-sized firm employs 11 people, with 77 percent employing 10 or fewer, the study concludes. Service firms employ an average of 4 employees; manufacturing firms, 17. Ninety-one percent of West Germany's mid-sized businesses do not export, the survey states.

### Government worried over future of social security system

With the West German birthrate the lowest in the world for almost 16 years, the government expects serious consequences for the social security system as the age-dependency ratio worsens.

According to the latest estimates, by the year 2000, West Germany's population will decrease to 54.9 million, down from its current 60.7 million, with the population rapidly graying. To mitigate this trend, and maintain the current population level, some 850,000 children must be born annually, according to the Minister of the Interior Friedrich Zimmermann. In 1985, 584,000 children were born.

## More money for saving and spending

Private consumption is expected to rise as West Germans enjoy decreasing taxes, increasing employment, and higher wage settlements, according to Bonn's Bundesbank Report.

Net income for households increased more than four percent in the first quarter of 1986, the report states. Falling oil prices are largely responsible for the saving of DM 15 billion for private households.

## Joblessness in the European Community

Jobless persons in the Community of Twelve numbered 16 million in April 1986--a drop of over 360,000, due largely to seasonal factors. Men gained the most, registering a 3.4 percent fall in unemployment. Particularly large falls were seen in Denmark (-16.7 percent) and West Germany (-14.3 percent).

Overall since 1985, the number of unemployed men has fallen by -0.2 percent. Member states show considerable variation, however, with Italy registering a 9.4 percent *increase* in the number of unemployed men as compared to Denmark's 21 percent *decrease*, Belgium's 15.4 percent decrease, Luxembourg's 11.8 percent fall, and West Germany's 8.2 percent decrease.

Women, however, have fared poorly. Over the past year, the number of women registered as unemployed has risen 5.2 percent, following large rises in Spain (12.6 percent) and Italy (8.6 percent).

# *NORTH AMERICA*

## 2.7 million Canadians have some level of disability

Sixty-six percent of disabilities reported by adults in Statistics Canada's Health and Disability Survey 1983-1984 are associated with mobility and body movement; 22 percent are related to hearing and seeing.

Four percent of those aged 15 to 24 reported a disability, compared to 39 percent of those aged 65 and over. Six percent of those aged 14 and younger--a total of 302,000 children--were identified as disabled.

Over 40 percent of disabled persons aged 15 to 64 are employed, compared to 67 percent of the non-disabled population.

Diseases of the musculoskeletal system and connective tissue, arthritis and rheumatism, and hearing disorders most frequently cause disability for Canadians.

Many disabled Canadians are in need of aids to help them cope with their disability. About 85,000 need special features such as ramps or elevators; about 120,000 need such mobility aids as handrails in their homes. Over 80,000 hearing-impaired Canadians need hearing aids, and 20,000 need a pair of glasses.

For more detailed information, order *Report of the Canadian Health and Disability Survey*, 1983-84 (82-555E, $15), from Publication Sales and Services, Room 1710, Main Building, Statistics Canada, Ottawa K1A 0T6, Canada; telephone, 613-993-7276. For information over the phone, call Ed Praught in the Health Division at 613-990-8575.

## Canada's population increase continues to slow

Canada's population slowdown which began in the 1960s continues in 1986, with 232,000 more people recorded in April, 1986 than a year earlier. This 0.9 percent rise--bringing the population to an estimated 25,551,200--is the smallest percentage increase in the last 50 years.

Canada's average annual rate of population increase has decreased from 2.7 percent in the 1950s to 1.8 percent in the 1960s and 1.2 percent in the 1970s. The first five years of the 1980s saw only a 1 percent average annual rate of population increase.

The main factor underlying the slowing trend, particularly in the 1960s, was a failing birthrate. Slowed population growth in the 1980s, however, is due primarily to reduced immigration.

# *CENTRAL AMERICA*

## Mexico's labor force

Absorbing those born before falling fertility rates started to decrease the numbers of those entering the labor force is an ongoing problem for Mexico. Despite a projected increase in the number of jobs, there will be more unemployment and underemployment as 700,000 to 800,000 young people look for work each year.

The labor force is projected to increase rapidly at least until 1989, with a growth rate that will not slow significantly until the year 2000. Mexico's previous high birthrates gave rise to a classic case of demographic momentum in which the economically active population grows faster than the total population for some time. At present, while Mexico's total population increases at 2 percent a year, the labor force increases at 3.4 percent. Job creation for Mexican industry, therefore, will be an enormous task.

At present, the Mexican labor force is estimated at about 24 million--about 30 percent of Mexico's current 82 million people. Unemployment represents about 3.5 million; some 40 percent of the 20.5 million employed are considered underemployed or as holding informal jobs. People holding regular jobs number about 11.5 million, of which 4 million are employed by the government. The productive economy accounts for only 7.5 million, 5 million of which are employed in industrial jobs, the rest in services and primary activities.

Source: Pop. Reference Bureau, Inc.

INSIDE INFORMATION

# Yuppie haven?

## Take a closer look at small-area data for Old Montreal

Small-area data can be just what you need to avoid costly business mistakes. But it also can lead to mistaken and costly conclusions if quick judgments are made.

Take the case of Montreal's census tract number 55--the principal census tract in what is known as Old Montreal, the area of the city that was the site of the first permanent settlement in 1642. Using two summary volumes from the 1981 census, we explored the demographics of Old Montreal, first looking at the numbers and then figuring out what they told us about the consumers who live there. Digging beyond surface appearances turned up some surprising and important findings.

Old Montreal is a favorite tourist attraction. Renovation and restoration of the area began in the early 1960s, and it has been expanded to include the waterfront and historic buildings that are protected from further demolition. The area is home to several museums, Notre-Dame Cathedral, restaurants, bars and jazz clubs, boutiques, and art houses.

A first look at the numbers told us this about the residents of Old Montreal. In 1981, census tract 55 had 1,015 residents. Of those, 530 were men and 485 were women. Few children lived in census tract 55--fewer than 50, in fact. Of the residents over the age of 15, 44 percent were single, 40 percent were married, and 15 percent were widowed or divorced.

In this predominantly French area, French was the mother tongue of 69 percent of the residents, but the same percentage claimed both English and French as their official language.

The majority of the residents were natives of Quebec province. They were extremely well educated. Nearly 40 percent had a university degree, and 51 percent had at least attended university.

Moreover this was a white-collar area. Seventy-two percent of the men were in professional, managerial, artistic, or religious occupations, and 46 percent of both men and women were in the community, business, or personal service industries.

And except for a high proportion of singles--44 percent of people over age 15 had never married--the area was one of two-paycheck, husband-wife couples. Forty-one percent of the people over age 15 were married, and 89 percent of the families were husband-wife families. More than three-quarters of the husband-wife families were childless, and more than 50 percent of the wives worked outside the home.

Our natural instincts told us that this area was a "yuppie" section of Montreal. After all, young, single professionals seemed to dominate. Then we continued to examine the data.

One thing stood out. Of 375 employed men, 41 percent were in "technological, social, religious, artistic, and related occupations." In most other census tracts surrounding tract 55, it was more like 14 percent of men in those occupations. In Montreal as a whole, only 9 percent of employed men were in those occupations.

These data set us thinking. We explored further to learn that there is a large religious community in the census tract which contributes to most of the factors noted earlier. The religious community was responsible for the large percentage of men between the ages of 25 and 34, the high educational levels, the small number of children, and the high proportion of people who speak both French and English, even though natives of Quebec province dominated the census tract.

A first look at this census tract would tell a site locator that it could be a good site for a jazz club, a book store, a classy restaurant, or a take-out restaurant with "gourmet-style" food. And because it is an important tourist area in Montreal, the club, an appropriate book store, or a restaurant might do well. Whether a take-out restaurant would work, given the small population in the neighborhood and the fact that the members of the religious community may have access to their own food services, would depend on further investigation.

As in the case of Old Montreal, you can learn a lot by closely examining small-area data, but thinking analytically about the numbers can help you avoid quick, expensive, conclusions.

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